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ABSTRACT

Intended to assist school administrators in developing both student information systems and total information systems, this guide contains suggestions which, when considered in terms of local characteristics and concerns, can be used to create such systems to support administrative decision making, state and federal reporting, guidance, research, and strategic planning. Fifteen activities in the development of basic information systems are detailed: (1) obtaining the necessary local education agency (LEA) commitment, (2) establishing a relationship with the LEA, (3) appointing the LEA coordinator, (4) advisory committee selection, (5) forms needs assessment, (6) identification of data needs, (7) refinement of data needs, (8) input-output forms preparation, (9) input-output dictionary preparation, (10) developing procedural materials for data collection, (11) field testing, (12) materials revision, (13) creating file systems, (14) writing operating procedures for data retrieval, and (15) formatting final orientation sessions. Appendices contain worksheets for each activity. (FM)

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LEA
BASIC DATA SYSTEMS

A MANUAL OF
DEVELOPMENTAL ACTIVITIES

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Preface

School systems historically have not maintained adequate student information systems for legitimate purposes of administrative decision making, state and federal reporting, guidance, research, and "strategic planning." This practice has been vividly brought to light since the onset of education's 'accountability' factor.

This manual has been developed through the cooperative effort of the staff of the Auburn City School System, Auburn, Alabama, and Roderick W. Powers, Office of Planning and Evaluation, of the State of Alabama's Department of Education. It is specifically intended to assist school systems in the development of their student information systems, and generally, in the development of a total information system. This document is not a definitive statement of activities that must be conducted but contains suggestions which when considered in terms of local characteristics and concerns can be used for the development of either an information system or a student information system. It is to these ends that this manual is dedicated.

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CHAPTER I

Introduction

Education, as we know it today has been hampered from its beginning in making realistic progress toward assisting student learning and aiding administrators in their decision-making processes by insisting on conforming to inflexible, inaccurate, inappropriate, and archaic methods of gathering, analyzing, and reporting education data.

Demands for needs assessments and precise statements of objectives in program development -- to mention just two critical needs which place demands on school districts -- have radically changed the perspective on the type of information needed in elementary/secondary school decision making. Additionally, the national trend toward increased accountability in education has placed a burden on school systems' information delivery capabilities.

Currently, and for the immediate future, more specific information will be required by state and federal agencies at several levels of administration. This is documented by the recent enactments of state legislatures making it mandatory for not only State Departments of Education to institute offices of Forms Management and Data Control, but local education agencies must do likewise. Further evidence of the paperwork burden is manifested by the OCR Forms 101 and 102. Most educational administrators at the local levels are suspect of what will be required by the Special Education Act #94-142.

The Office of Planning and Evaluation of Alabama's State Department of Education has attempted to assist their LEA administrators with their informational request burden. This office conducted a review of the literature and ascertained that there were no documented models pertaining to the developmental activities associated with the construction of a student information system. They also requested an automated search, conducted by RISE of Pennsylvania, and found that over a half-million searched documents reflected the same state of affairs. The State of Alabama's Department of Education, Office of Planning and Evaluation, took the initiative and has designed a model program for the development of informational systems.

Because the greater percentage of Alabama's school systems have a student population of less than 6,000, and do not have the fiscal resources to operate an automated data processing system, a manually-operated, key-sorted system was developed. The model program was developed in the Auburn City School System which served as the pilot school system. This developmental effort is one of the most highly documented programs in existence today. Even though its primary thrust was concentrated on those activities designed to produce a student information system, it encompasses those activities which make it applicable toward the development of other facets of a total information system.

Each developmental activity, as presented in this manual, has been divided into its major steps. The major steps have been subdivided into the substeps which are necessary to conduct if one is to complete the activity. Each substep may include one or more phases. Every phase, within each substep, has been assigned an alphabetical character. Recommended procedures to be followed have been written for each alphabetical character within a substep.

The developmental activities proposed and explained in this manual suggest a systematic approach to the development of your informational system. When adapted to your particular situation and conscientiously followed, its product could be most beneficial to your school system.

CHAPTER II

ACTIVITY # 1- OBTAINING THE NECESSARY LEA COMMITMENT

This is the first of a number of activities that must be conducted in order for you to develop a comprehensive student information system. All school systems do not necessarily have to conduct each and every listed activity. Activity #1 happens to be an activity that MUST BE conducted by all school systems.

Because the development of a student information system expends a considerable amount of time and involves the entire staff of the school system, it is not an undertaking to enter into lightly -- it requires a total commitment of the school system.

The format of presentation in each chapter of this manual is as follows:

1. The major steps involved in completing the activity are identified initially -- in sequencial order.

2. Each major step is then presented separately. The sub-steps, in sequence, are identified by an alphabetic designator.

3. Recommendations for conducting each sub-step are keyed to their corresponding alphabetic designator.

Outlined below are the recommended step-by-step procedures to follow in conducting Activity #1. This activity is designed to assist in the procurment of the necessary commitment to the development of a student information system.

Major Steps

1. Justification
2. Consultant Conference
3. Key Personnel Conference
4. Board of Education

Step #1 Justification - Superintendent

a. Investigate
b. Evaluate
c. Justification

Recommendations For Step #1

a. The superintendent must initiate an investigation of the school system's situation in light of its: present data base; present informational request burden; turn-around time involved in replying to data requests; present information management system, if any; capabilities utilizing the present information system; and, informational needs as reflected by instructional staffs' requests for specific information. (See Figure 1.)

b. If the investigation reveals that the school system's information system is incapable of meeting the response burden placed upon it, then criteria that justify the development of a comprehensive student information system have to be identified.

c. The superintendent must feel comfortable with the identified justification criteria. If the superintendent feels that justification is untenable utilizing these criteria; stop, and reassess. Do not proceed any further with this activity until you feel comfortable with the justification rationale.

Before conducting the next step in this activity the superintendent should attempt, if in mind only, to conceptualize: the design of the future data base; the data base's projected capabilities; how it would impact on the response burden; and how it would assist the instructional staff.

Step #2 Consultant Conference

a. Review
b. Request

Recommendations For Step #2

At this point in time, when you feel you can justify the development of a student information system, you should request the services of an outside consultant. The consultant should possess expertise in the areas of forms management and data control, and in pupil personnel services.

a. Present the consultant with a review of the investigation you just conducted, the proposed design of the new information system, and the criteria that justify the development of said system. Make note of the consultant's reaction to your presentation - especially any recommendations.

Figure 1

Superintendent's Questions

1. Does our school system have an informational system?
2. If so, is it a formal or informal system?
3. What are the major divisions of the system?
4. Do we presently compile data on all staff personnel?
5. Do we presently compile financial data pertaining to all operations of the school system?
6. Do we presently compile comprehensive data on all students enrolled in or through our school system?
7. Do we presently compile data pertaining to the physical plants that house our system's program?
8. Do we presently compile data pertaining to the instructional program being offered?
9. Where are the records for items 4 - 8?
10. What type of filing system(s) are we presently utilizing?
11. How do we generate data for items 4-8?
12. How do we presently respond to requests for information for data found in items 4 - 8?
13. How many requests do we now process for items 4 - 8?
14. How much money is being expended for each request?
15. What information does the instructional staff need that they presently do not receive?
16. Does the school system "need" a formal information system?
17. What should be the major divisions of this system?
18. Where should the "system" be located" Parts?
19. What should be the adopted filing system?
20. What process should be used to generate information?
21. What is the projected cost? Is this a savings? How?
22. Who should "operate" the system?

b. Before the conclusion of the conference is reached, if needed, an attempt to secure the future services of the consultant should be made. In the event that the individual does not have sufficient time to act as consultant to the developmental process, inquire as to the name(s) of other consultant(s) that could be contacted.

Step #3 Key Personnel Conference

a. Selection
b. Review
c. Presentation
d. Evaluation

Recommendations For Step #3

a. The superintendent should select a group of staff personnel and lay persons to assist him in the development of the proposed system -- this is a SELECT committee. This group should be comprised of not only your key personnel, but should also include representation of antagonistic staff and lay persons. It is to the superintendent's advantage to identify any negative attitudes toward the development of such a system as early as possible. A concerted effort should be made during this conference to convince all group members of the worthwhileness of the proposed system -- especially those who have been known to voice opposition to the school system and/or its operation.

Before presenting the project the superintendent should establish some parameters concerning group interaction during the initial explanation of the project and the presentation of supportive materials. DO NOT permit any commentary until you have finished the formal presentation. DO encourage those in attendance to take notes during your presentation.

Open the meeting to questions about the proposed system. Use your consultant only when necessary. This select group must feel that YOU are the initiator of this proposal and that YOU are firmly convinced as to the advantages that can be gained from its implementation. Make note of those points of dissention/disagreement so that they can be eliminated in the near future. Listen to what the people are saying. Evaluate your position after hearing the commentary concerning your proposal. If there are significant questions that went unanswered, you should: thank the group for their assistance; assure them that every attempt will be made to provide them with materials concerning their unanswered questions; and, make the necessary arrangements to reconvene the group in the not-too-distant future. Establish a definite date only if you believe you can provide answers to their questions!

If the concensus of the group is of a positive nature then proceed with the next step. Do not proceed to the next step if you had to reconvene the group to provide materials covering unanswered questions. Have a strong majority with you before conducting Step #4.

Step #4 Board of Education

a. Select group
b. Presentation
    1. Explanation of project
    2. Supportive materials
    3. Requests
c. Products
    1. Board Resolution
        (a) Commitment
        (b) Released time
        (c) Sufficient time
        (d) Finances
c. Evaluate

Recommendations For Step #4

a. As Step #4 is a formal presentation to the school board, there are meaningful actions that should be taken prior to the presentation. One, to invite all your select group to participate in the formal presentation. You, as superintendent, make the formal presentation, but you should provide each member the opportunity to voice her/his reaction to the proposal -- even though you know some individuals could voice negative reactions. You should not have progressed this far without being confident that your justifications would support your proposal. Secondly, you should contact each member of the school board and inform them as to the intent of that agenda item. There are key board members who you will want to inform more in detail than others; and maybe, even identify some of the negativism expressed by members of your select group. Thirdly, you should determine whether or not the presentation will be conducted as a formal item on the agenda.

b. Present your proposal to the school board. The presentation should include the following: a detailed explanation of the proposal; the justifications for implementation of the system; the cost factors, supplies, materials, and personnel, if any; and conclude your presentation with a request to be permitted to submit relative resolutions later in the meeting. Call upon each member of your select group to voice their reaction to the proposal. When the select group have all been called upon to speak; then open the discussion to members of the school board and others, if this is permitted during school board meetings. Listen attentively to the question-answer dialogue and evaluate the situation. If there are too many unanswered questions you should; request permission of the board to investigate further, meet with them at a later date to present your findings, and to make specific requests at that time. Assuming that your presentation was accepted without undue criticism and your evaluation of the situation is of a positive nature, you should close by requesting specific action to be taken pertaining to your resolutions by the board. This is

assuming that it is a session at which the board can legally conduct business. Your requests should be presented in the form of resolutions to be acted upon by the board. (See Figure 2.)

c. Products, as used here, mean the resolutions you should obtain favorable action upon. They are absolutely necessary to protect the integrity of the project. The action taken by the board should be in the form of a resolution. Said resolution should contain the following pertinent items: a general statement of commitment to the project; specific statements pertaining to released time for members of the staff when they are involved in project tasks; that sufficient finances are provided with which to purchase equipment, supplies, and additional personnel if needed; and that the project will enjoy sufficient time during which the system can be developed, implemented, and evaluated, without fear of discontinuance. This resolution is absolutely vital to the success of the project.

d. Evaluate the situation. Favorable action by the board signifies you can now continue with the necessary developmental activities. Any other action or non-action of the board should promptly motivate you to request another meeting with the board at some time in the near future.

Figure 2

Board Resolution

WHEREAS, the Abbott School System does not have a formal information system; and

WHEREAS, the formal request burden has become a dysfunctional aspect of our school system's instructional program; and

WHEREAS, the cost/effectiveness of our school system's present method of reporting is unjustified; and

WHEREAS, the administration of this school system deems it imperative to develop a formal information system; and

WHEREAS, the development of said system will involve an extensive amount of time and energy of the school system's staff; and

WHEREAS, the administration of the school is constantly striving to improve the quality of education it offers its citizenry;

THEREFORE, BE IT RESOLVED, that the Board of Education for the Abbott School System hereby instructs the administration of the Abbott School System to develop a formal information system; and

BE IT FURTHER RESOLVED, that the Board of Education recognizes the need and importance of the involvement of the school system's staff and thereby grants its permission for the released time of involved staff; and

IT IS FURTHER RESOLVED, that the Board of Education shall provide the finances necessary to carry this project to its completion or for three years whichever comes first; and

IT IS FURTHER RESOLVED, that the Board of Education shall conduct a biannual workshop for reports pertaining to this project and annual updates upon completion of the system;

THIS RESOLUTION, is adopted on this the 19th day of January, the year 1977, and shall be initiated at a date no later than the 28th day of February of the year 1977.

Chapter III

ACTIVITY #2 - ESTABLISHING RELATIONSHIP WITHIN THE LEA

The initial inclusion of your entire staff is vital to the success of your efforts to develop a student information system. After all, they are the ones who will be doing most of the "work", identifying needs, prioritizing data items, field testing materials, and functioning as your feedback base. Relate to them all the pertinent facts, and your confidence in their professionalism to give the proposed system an opportunity -- stress their role.

Major Steps

1. News Releases
2. Orientations

Step #1: News Releases

a. Board Action
b. Coordinator
c. Advisory Committee

Recommendations For Step #1

a. Have your newsletter prepared in advance. Staff members do not take too kindly to being told about something two days after they read about it in the newspaper. I'm sure you have had sufficient involvement with the news media to be cognizant of the fact that they are reluctant to "hold" news items. Also remember, that members of your select committee have probably disseminated considerable information about the proposal long before now. Some may think you quite presumptive in having the news release prepared beforehand, but a positive statement about letting your staff know as quickly as possible should quell any negative thoughts. Do not attempt to describe, or elaborate, on the proposed system to personnel of the news media. Your own people might be misled and think that you have already decided on what will be. *All three bulletins should be released to the news media at the same time. Dissemination within the school system itself should be to each staff member -- professional and non-professional. (See Figure 3.)

b. The second bulletin to your staff should be the announcement of the position of LEA Coordinator. This bulletin should include the

Figure #3

Abbott School System's Information System

The Student Information System (SIS) project we are undertaking involves the development of an information system which will provide teachers with data on students in a timely and accurate manner. The data being provided teachers should enable them to better understand the individual student and therefore, provide a more realistic educational program for the individual. This is the primary thrust of this project.

Some of the data can be aggregated and thusly provide administrators the necessary information for informed decisions. This is the secondary thrust of the project.

Would it be helpful to you as a teacher to know individual and group results of our standardized test program? Is attendance information an important ingredient in the selection of an instructional program for an individual? What should you know about an individual's skill development or academic achievement? How much demographic information should we have on students?

We shall be asking every member of our staff what type(s) of student information they need to better enable them to meet collective differences and/or individual needs. What is of extreme importance is that, whatever is developed, it will reflect the informational needs of our school system. This system will work for us and can save each of us that most urgently needed ingredient - time. In addition, we shall have at our fingertips an updated, useable system to enable us to work with students more effectively and efficiently. This new opportunity presents an exciting challenge to develop, record, and maintain supportive data that we have needed for so long.

Abbot's Board of Education passed a resolution at their meeting last night which states their unequivocal support of the project. The board's action further stipulates their financial support over the next three years, released time for teachers, and their acceptance of new personnel, if needed.

Figure #4

LEA Coordinator

Introduction: The development of our student information system is important to the educational program conducted by our school system. Any information system which is to remain in existence must provide the user with something of value toward the obtainment of stated goals. The information must be timely and accurate to identifiable specifications. Teachers and administrators must remember that the amount of information utilized by our system is in direct proportion to our risk tolerance.

Qualifications: The local coordinator for the development of our student information system is the pivotal position of the undertaking; this is the key person within our school system. This person must be held in high esteem by the professional and non-professional staff associated with this developmental project. It should be a person with some administrative experience, a teaching background, familiar with guidance programs, and knowledgeable about techniques that are applied to individual and group analyses. This individual should possess an advanced degree in other than a teaching field.

Functions: The coordinator will act as the liaison between the school system's staff and the board of education. This individual will develop a Gantt Chart for all activities, a reporting calendar, design and develop the necessary collection-reporting instruments, and develop an orientation program(s) designed to instruct the staff in the proper use of the system upon completion of the developmental activities.

Applications: Any person interested in being appointed to this position, who meets the stated prerequisites, should indicate said interest in writing to Superintendent Abbott.

Figure #5

Advisory Committee

The Advisory Committee for the development of our informational system will reflect the organizational divisions of our school system; primary, middle schools, junior high school, high school, and central office. The committee will also include representation from all non-professional categories. This committee should be composed of teachers representing various organizational divisions and disciplines, building administrators, central office administrators, secretaries, supportive staff, and community lay persons.

The Advisory Committee's responsibilities will be to assist the school system in fulfilling its obligation to the project. Some of the more important responsibilities of the committee are as follows:

1. Act as the liaison between the committee and the "groups" they represent.

2. Assist in the completion of all developmental activities.

3. Review all products produced by the activities.

4. Assist in the decision-making process.

Any lay person interested in serving on this committee as a representative of the community should contact Dr. A. B. Cee, Superintendent of Abbott City School System.

desired qualifications, a description of the functions of the position, and the procedure to be followed by applicants. (See Figure 4.)

c. A third bulletin is also recommended. This bulletin announces the school system's intent to create an advisory committee. The bulletin should include a description of the role that the committee will Play in the development of the student information system, desired qualifications of its membership, and the procedure to follow if one is interested in being considered an applicant. (See Figure 5.)

Step #2: Orientations

a. Building Level - Grade Level
b. Presentation
   (1) Project
   (2) Materials
   (3) Board Action
   (4) Coordinator
   (5) Advisory Committee
c. Involvement
   (1) Coordinator
   (2) Advisory Committee
   (3) Staff Members
   (4) Applicants

Recommendations For Step #2

a. Be prepared to initiate the orientation program the day following the board's approval of the proposal. It is recommended, even though yours may be a large system, that you conduct the orientations by buildings. Meet with X High School on Monday, Y High School on Tuesday, and Z High School on Wednesday, A Junior High School on Thursday, and so forth. An alternate plan is to meet with your staff by grade level and service areas. First grade teachers on Monday, second grade teachers on Tuesday, maintenance personnel on Wednesday, food service workers on Thursday, and so forth. Strange as it might seem, teachers housed in one building relate more meaningfully with other teachers from the same building than they do with teachers from another building. The only exceptions we evidenced were when the teachers involved were representing all one grade level; or all one subject field, such as English teachers.

b. The orientation presentation should be thorough, yet held to a minimum amount of time. Allow sufficient time at the conclusion of the formal presentation for questions from your staff -- and they WILL ask questions. The orientation program itself should include the following items of discussion: presentation of an overview of the proposal; justification for the development of such a system; action taken by the board of education; your faith in their capabilities to complete the task at hand; and conclude the program with brief comments about the positions of LEA Coordinator and the Advisory Committee.

During the formal presentation cover all the areas as quickly as possible, with the exception of the action taken by the Board of Education -- dwell on the action of the board. Emphasize each item referred to in the Board's resolution, and set everyone's mind at ease about the project being one of those "here today and gone tomorrow" changes. Point out the Board's commitment in general, the financial commitment to support the developmental activities, released time, and make it clearly understood that more than ample time has been provided to complete the tasks involved.

c. Announce the creation of two new "positions." One, the local coordinator, and the other being the advisory committee. Stress the importance of these two positions. Build on your staff's involvement. Convince them that whatever the final product might be, it will be what the entire school system needs as its student information system. Inform the staff that bulletins have been distributed to every person employed by the school system. Relate to them that the bulletins describe the role and responsibilities of each position, and the procedures for applying. Go even further and inform them that you will be seeking their recommendations of individuals to fill these positions. Encourage interested individuals to apply for these positions!

Chapter IV

ACTIVITY #3 - APPOINTING THE LEA COORDINATOR

The individual appointed to this position is crucial to the successful development of the student information system. It must be a person that is: held in high esteem by other members of your staff; knowledgeable about research, evaluation, and student records; capable of not only making decisions but seeing that those decisions made are carried through.

It is important that your local coordinator comes "on board" as quickly as possible. Remember, as the job title implies, this person will coordinate the remaining activities and, to a great extent, determine the success or failure of the project. It should be quite evident then that even though you have a pressing time constraint, you must be judicious in your selection.

MAJOR STEPS

1. Bulletins
2. Recommendations
3. Applications
4. Review Personnel
5. Considerations
6. Selection

Step #1: Bulletins

a. Announcements
   (1) Orientations
   (2) Bulletin Boards
   (3) Individuals
   (4) Others

Recommendations For Step #1

a. Announcements should be prepared in advance. Preparation expedites the dissemination of materials and at the onset of developmental activities you will be pressed for time. At the same time that you begin your orientation programs, you should distribute copies of the LEA Coordinator announcement to each member of your staff, and to each building for posting on the teacher's bulletin board. The news media should have received a copy at an earlier date (when the school board took action on the proposal). Copies should be sent to those educational institutions and agencies that you deem appropriate (you might not have a qualified person on your staff).

Step #2: Recommendation Requests

a. Teachers
b. Administrators

Recommendations For Step #2

a. Within a weeks time follow up the bulletins with a letter to each member of your staff requesting the name(s) of individuals they perceive meeting the qualifications for the position of local coordinator. The content of the letter should imply that you are seeking their assistance in the selection process, because whomever is appointed must have a close working relationship with the entire staff. The letter should also encourage staff members to reply, even though it is not mandatory to do so. (See Figure 6.) Compile an alphabetical list of all persons recommended from your replies, and their respective frequency of recommendation. Do not make this listing available publicly.

b. At the same time you send your letter out to your "staff," you should also send a similar letter to each of your building principals. This letter should request recommendations, but there should not be a reply option -- it should be mandatory. (See Figure 7.) Compile an alphabetical list of those individuals that your building principals recommend.

Step #3: Applicants

a. Applicant Interviews
   (1) staff
   (2) others

Recommendations For Step #3

a. Interview each staff member that applies for the position. Do not screen any applicant out. It may take some additional time to interview all your staff applicants, but you will eliminate the possibility of alienating any individual, or faction, within your system by doing so. Remember, you have encouraged your staff to apply if they are interested in the position. Compile a list of applicants.

Step #4: Review Personnel

a. Comparisons
b. Interviews

Figure #6

M E M O R A N D U M

TO: All School District Employees

FROM: Superintendent A.B. Cee

SUBJECT: Recommendations for LEA Coordinator

All employees of the Abbott School System should be aware now that the school system is attempting to develop its own student information system. From your orientation meetings you should also be cognizant of the level of involvement I expect from you as an employee of this school system.

Having been involved in the employment procedures of this school system for a number of years, I know that there are a number of individuals qualified to fill the position of LEA Coordinator. If you have read the description of the desired qualifications and the responsibilities of this position, you can be of great assistance to us. We need to know which person(s) you feel would function most effectively and efficiently in the position of LEA Coordinator. I am, therefore, requesting that you identify said person(s) by listing them on this memorandum and returning it to me. As you see; there are neither names, nor numbers, affixed to this memorandum, so your confidentiality is protected.

I shall appreciate your assistance in the process of selecting the most productive individual for this position.

:lem

Figure #7

M E M O R A N D U M

TO: Administrative Staff

FROM: Superintendent

SUBJECT: Coordinator of SIS

As indicated during the orientation meetings, recently conducted throughout our school system, I am requesting your recommendation(s) of the person(s) you perceive to be most qualified for the position of coordinator of the SIS project.

The person(s) recommended by you do not have to be working in your building. Many of you have served in various administrative capacities throughout our system and, therefore, have knowledge of the competencies of personnel other than of those presently serving directly under you.

Your compliance to this request is appreciated and I shall alert you as soon as possible, if the appointee is presently a member of your staff.

/lem

Recommendations For Step #4

a. You should have four lists; staff recommendations, administrative recommendations, staff applicants, and others. Compare the first three lists just mentioned and identify those individuals that were recommended, but who have not made application for the position. Schedule individual appointments with these people. During these interviews let the individuals know that they were recommended by their peers, and that you are utilizing every available tool and technique to complement the selection process. (It strengthens your position as the educational leader and tends to build a more cohesive staff.)

Step #5: Considerations

a. Time
b. Personnel

Recommendations For Step #5

a. Before making a selection there are some variables you should consider. One of these variables is the time factor. How long will it be before the selected individual can be employed as the coordinator? Should this individual be a full-time or part-time employee?

b. A second variable is the personnel factor. If the selected individual is presently a staff member, do you have a replacement available? If the position is to be part-time, do you have sufficient personnel to cover the relinquished responsibilities of the new coordinator. What, if any, administrative problems will be created by an internal transfer? Can there be shared secretarial services? How many,if any, additional people will have to be employed? Because the personnel management techniques are somewhat unique to each school system, the variables you should consider before selecting your coordinator will probably vary greatly. The two variables presented for consideration should be universal, but they are not the only variables you might want to consider in your own local situation.

Step #6: Selection

a. Acceptance
b. Announcement
   (1) News Release
   (2) Bulletin

Recommendations For Step #6

a. Do not put all your eggs in one basket! The person you have in mind might decline the position. Narrow your selection down to three or four individuals. Interview each one again and inform them that they are one of the finalists and; if selected, would they accept the position. Make your selection and obtain the individual's acceptance in writing. If the selection involves an internal transfer you should alert the appropriate administrators and have the replacement process initiated.

b. The announcement should contain all the information pertinent to the situation -- especially if it is an internal transfer. Bulletins should be distributed to each building for posting and a release given to the news media. The announcement should include the professional and demographic information about the selected individual, and on his/her replacement (See Figure 8.) This indicated to your staff and the general public that there will not be any disruption in the system's educational program because of an internal transfer. Make sure the bulletin has been distributed before you inform the news media.

Figure #8

M E M O R A N D U M

TO: Professional Staff
Supportive Staff

FROM: Superintendent

SUBJECT: Coordinator of SIS

I would like to take this opportunity to thank each and every member of our staff for their involvement in the selection process of the student information system coordinator. Your responses, to my request for recommendations of individuals for this position, were overwhelming. It truly made the selction process a much easier task.

I am more than pleased to announce that Ms. Abbey Maxe has been appointed the coordinator for the development of our student information system. Ms. Maxe has spent the last six years as a quidance counselor at the Middle School and previous to that she was a mathematics teacher at the College Elementary School. The B.S. and M.Ed. degrees were conferred upon Ms. Maxe by Auburn University.

The guidance counselor's position vacated at the Middle School has been filled by Mr. D. D. Diamond, a recent graduate of the master of education program at Pepperdine University. Mr. Diamond will assume the responsibilities of this position starting next Monday; thereby providing uninterrupted counseling services at the Middle School.

/lem

CHAPTER V

Activity #4 - Advisory Committee Selection

Do not overload the Advisory Committee with administrators, or with "weak" decision makers. Remember, your staff as a whole is assisting in the developmental efforts, so equal representation is essential. . You can appoint individuals to the Advisory Committee, or you can let the staff select the members through a representative process -- we strongly support the latter method. Experience has taught us that more meaningful input into the developmental processes comes about through the use of a combination of grade-level representatives and organizational-level representatives. The total number of staff personnel, and the organizational structure of the school system have a direct bearing on the composition of the Advisory Committee. A decision concerning the membership of the Advisory Committee must be made prior to the onset of this activity.

Major Steps

1. Membership
2. Releases
3. Orientations
4. Elections
5. Interviews
6. Selection

Step #1: Membership

a. Representatives
b. Committee
c. Chart

Recommendations For Step #1

a. You should seriously consider utilizing your select group to assist you in identifying the process by which membership on the Advisory Committee will be determined. This shared responsibility places the selection process on those who will probably be most involved. you, as superintendent, could appoint the members of the Committee - we do not recommend this action on your part. We do recommend a grade/organizational-level representation or a grade/subject-field representation.

   The grade/organizational representation process is as follows: (1) each grade level, within each building, selects someone to represent

them in their respective building; (2) those selected as grade-level representatives, within a building, elect one person to represent that organizational level on the Advisory Committee.

The grade/level-subject-field representation process is as follows: (1) each grade level, within each building, that contains those grades normally considered as being the elementary level, elect one person to represent them in their respective buildings;(2) all grade representatives meet and elect one person to represent their grade on the Advisory Committee; (3) those buildings normally identified as being junior and/or senior high schools have teachers meet by subject areas and elect a representative from each building(4) the building/subject field representatives meet and elect one person to represent their respective subject field on the Advisory Committee.

Regardless of which one of the two processes you select (or one you develop yourself), you should have one administrator from each organizational level as members of the Committee. All aspects of "other personnel" should also be represented; i.e. secretaries, food service, supportive staff, and maintenance personnel.

b. This committee is the backbone of the developmental processes. If the composition of the committee appears to be negatively dominated, change it by appointing key personnel.

c. Whichever process is selected, depict the process on a schematic chart. When you have to describe the process during the orientation sessions you will find doing so is much easier when you have a diagram the audience can follow. (See Figure 9.)

Step #2: Releases

a. News releases

Recommendations For Step #2

a. Releases should be prepared and disseminated appropriately. Bulletins should be distributed to each member of the staff. The bulletin should describe the role and responsibilities of the Advisory Committee, and the process by which membership is obtained. At the same time that the bulletin is being distributed an announcement, or release, should be sent to all the local news media. This release should also describe the role and responsibilities of the Committee; and in addition, it should describe the application process to be followed by lay persons interested in serving on the Advisory Committee. (Same as Figure 5.)

Step #3: Orientations

a. Advisory Committee
b. Elections
c. Q-A Period

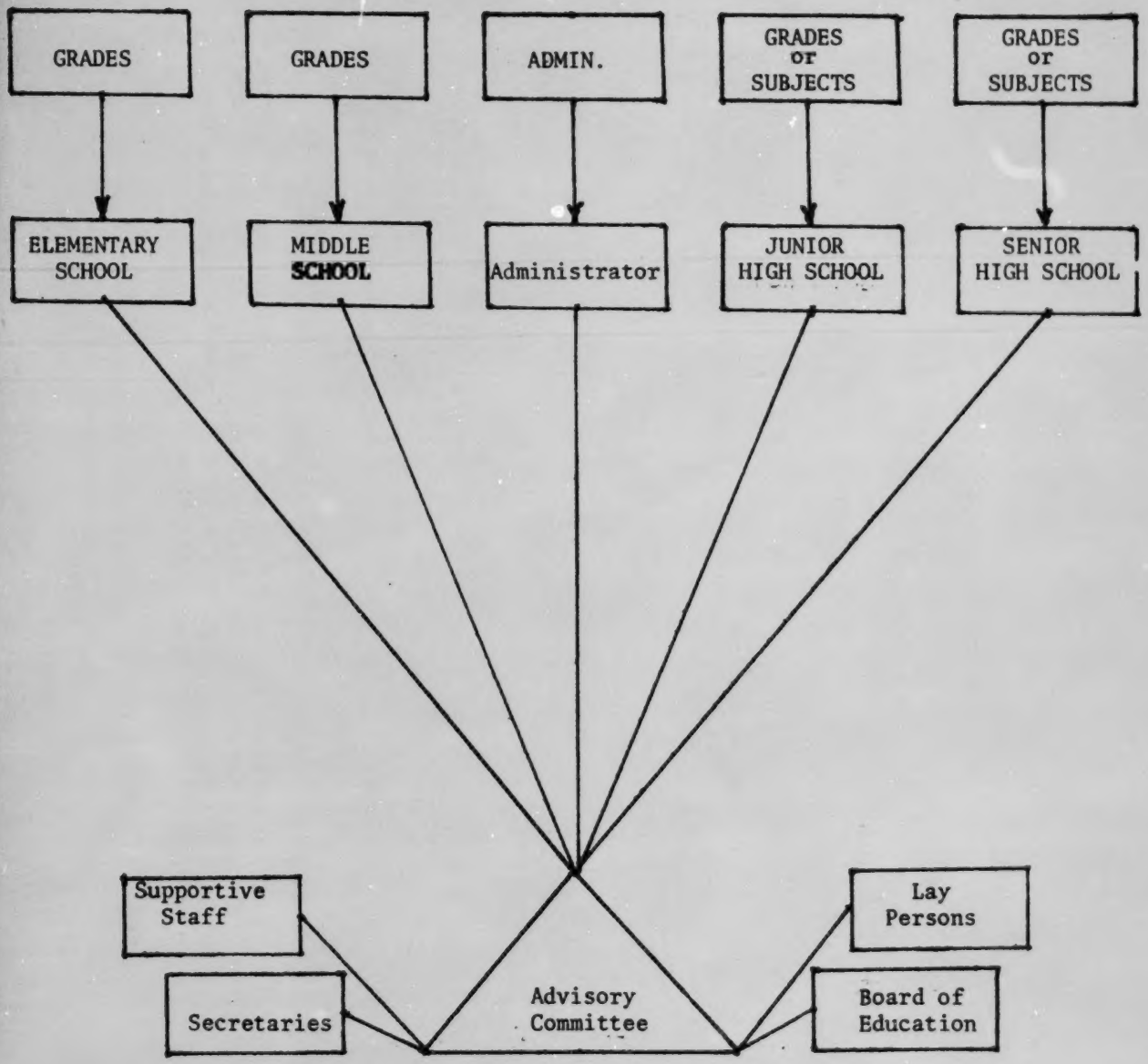

GRADES
GRADES
ADMIN.
GRADES or SUBJECTS
GRADES or SUBJECTS
ELEMENTARY SCHOOL
MIDDLE SCHOOL
Administrator
JUNIOR HIGH SCHOOL
SENIOR HIGH SCHOOL
Supportive Staff
Secretaries
Advisory Committee
Lay Persons
Board of Education

Figure #9

Recommendations For Step #3

a. Regardless of the organizational framework of the Advisory Committee, the orientation sessions should be presented building by building. Employees of a non-instructional nature should be informed as to which meeting they should attend. It is imperative that all employees of the system are made aware of the role and responsibilities of their respective representative and the Advisory Committee

b. Explain the election process in detail - use the schematic chart to summarize your explanations. Relate to the audience that every "group" will have representation on the Committee.

c. More than likely during the question-answer portion of the session someone will inquire about their involvement in the developmental activities. The coordinator should briefly describe the activities to be conducted. More emphasis should be placed on the processes involving the Advisory Committee and the presentation of new materials. It is very important that the staff sees that the Advisory Committee takes actions only after new materials have been presented and their action is the result of feedback coming from duly elected representatives.

Step #4: Elections

a. Process
b. Releases

Recommendations For Step #4

a. The organizational structure of the Advisory Committee will predetermine the election process. All elections should be conducted during the week that the orientation session was conducted in their building.

b. When all elections have been completed there should be two releases: (1) a bulletin to be sent to each school indicating the elected representatives within that building, and to the Advisory Committee; and (2) news releases to the local news media containing the identical information. (See Figure 10.)

Step #5: Interviews

a. Elected Personnel
b. Lay Persons

Recommendations For Step #5

a. The coordinator should interview each elected representative individually. During the interview the coordinator should explain the developmental activities more in detail, answer related questions,

Figure # 10

M E M O R A N D U M

TO: Professional Staff
Supportive Staff

FROM: Superintendent

Subject: Advisory Committee Members

I would like to take this opportunity to announce that the following people have been selected to serve as members of the Advisory Committee to the SIS Project:

Grade Levels

1 - Ms. Able
2 - Mr. Dow
3 - Ms. Cann
4 - Mr. Moore
5 - Ms. Persall
6 - Ms. Burchfield

Administrators

Dr. Maxe
Mr. Johns
Mr. Franks
Mr. Jimms
Ms. Ronneys

Junior High School

Ms. Bradd
Ms. Combs
Ms. Diane
Mr. Kidd
Mr. Black
Mr. Pippin

Lay Persons

Ms. Trubbles
Ms. Wong
Ms. Wright
Mr. Lite

Senior High School

Ms. White
Ms. Brown
Mr. Lee
Mr. Edwards
Mr. David
Mr. Dee

Judging by the committee-elect, I feel that everyone's interests will be capably represented. I also feel confident that the committee members will keep their constituents informed about the progress the student information system is making.

and generally attempt to establish a good working relationship with the individual. The interviews also provide the coordinator with the opportunity to gain some insights concerning the extent of the individual's involvement. Breakdowns in communication are always troublesome ; so if the coordinator can identify possible problem areas in advance, then the coordinator's functions become easier to perform.

b. The coordinator must also interview those lay persons who have indicated an interest in becoming a member of the Advisory Committee. It is recommended that protagonistic and antagonistic views be represented by lay person selections. One, you know what their arguments will be; and secondly, you could possibly be made aware of some aspect that had previously been overlooked.

Step #6: Selections

a. Lay Persons
b. Others

a. Again, have the pro's and con's both having representation on the Advisory Committee. If the range of choices is extensive, select those that presented the least communication problem.

b. There may be special interest groups that should be represented on the Advisory Committee and the coordinator will have to appoint someone to represent those interests. Individuals having expertise in specific areas pertaining to the development of the student information system might not have been elected by their peers, so leave the door open to special appointments. Remember, you have lists of people that were recommended and/or applied for the coordinator's position - look at these carefully.

Another reminder, all subsequent meetings and disseminations of materials should directly reflect the organizational process adopted for election to the Advisory Committee.

CHAPTER VI

Activity #5 - Forms Needs Assessments

If school systems conducted just Activities 5 and 6, their efforts would be worthwhile. The amount of data you are actually gathering, your duplication of collection efforts, and the amount of paper being consumed, will probably astound you. This activity will take a considerable amount of time.

Usually one thinks of a needs assessment as the identification of "what is" and how this compares with the "what should be." In this activity we are looking at: What information do we now collect for local, state, and federal purposes; where is the collected data being stored; what is the format of the stored data, why do we collect the information; when do we utilize the information we have collected; and, what forms are we presently utilizing to collect and report this information?

Major Steps

1. Requests
2. Collection of Forms
3. Categorize Forms
4. Purge
5. Listings
6. Identifications
7. Analyses

Step #1: Requests

a. Representatives
b. Employees

Recommendations For Step #1

a. Here, and henceforth, the organizational framework of your representatives - Advisory Committee is of significant importance. Most of the developmental activities will necessitate input and feedback through this framework. Do not attempt to circumvent the functions these people are to perform. To do so will surely cause the cessation of meaningful interaction between your staff and your developmental efforts. The coordinator should meet with the Advisory Committee and explain the function of this activity - to collect a copy of every "form" that is presently being used by the school system. The Advisory Committee members, in turn, describe

what is to be done to their appropriate representatives, and each representative explains it to their respective group.

b. Every employee of the school system is requested to submit a copy of each and every form that requires the entry of any information by them - even a signature. Forms, as used here, mean any document with which the individual records, collects, informs, or submits data. Report cards, federal reports, attendance reports, lunch room counts, disciplinary letters, budget forms, registration forms, are just a few examples.

Step #2: Collection of Forms

a. Representatives
b. Coordinator

Recommendations For Step #2

a. The initial collection efforts for this activity are conducted by the base-level representatives. Each representative should have a list of those staff members he/she represents, and the staff member's name should be checked when the representative collects that individual's "input" materials. Attempt to collect something from every staff member.

b. The coordinator should inform the representatives as to which day the submitted materials will be collected from them. As the coordinator goes from one building to another collecting materials, there should be a concerted effort made to keep the materials separated; by buildings, by organizational levels.

Step #3: Categorize Forms

a. Organizational Level
b. Federal, State, Local

Recommendations For Step #3

a. The collected materials should be divided into categories representing the origin of submittal; central office, high schools, junior high schools, elementary schools, superintendent, principals, etc. These categories should reflect the organizational structure of the school system.

b. Each of the divisions you have identified in (a) must now be subdivided into one of three categories; federal, state, or local. The determination of which is the appropriate category is based on the nature of the form; is the information contained on that form to be used at the local level, state level, or federal level. IMPORTANT - You will need to use these materials, as divided in activity 6, so retain as is.

Step #4: Purge

a. Irrelevant

Recommendations For Step #4

a. When all subcategorizations have been performed you are ready to purge the forms. While retaining your subcategorical groupings gleen out the irrelevant forms - duplicate submissions of identical forms. You must make note from which subcategorical group each form is extracted! This information is needed for Step #5.

Step #5: Listings

a. Organizational Level
b. Federal, State, Local

Recommendations For Step #5

a. Subsequent steps in this activity become more manageable and less time consuming if at this time separate forms listings are compiled. Develop a list of those forms that are utilized by each organizational level. Remember to incorporate the lists you compiled during Step #4.

b. As you list the forms by organizational level place one of three letters, which indicate the nature of the form, to the right of each listing; F - federal, S - state, and L - local. (See Figure 11.)

Step #6: Identifications

a. Format Surveys
b. Orientations

Recommendations For Step #6

a. You are now ready to develop the survey instruments which will identify the knowledge and use of the various forms you have collected. Format the first instrument so that federal, state, and local forms, by organizational level, are grouped together. Survey items of importance are to identify a few as follows: the date you received the form; the date the form is to be submitted; the source of the form; and to whom did you send the form after entering the requested data. (See Figure 12.)

A second instrument should be developed to identify the flow pattern of the various forms. This survey instrument's format should consist of the listing of the forms and the identification of individuals-offices where the forms could be sent. The respondent merely identifies the flow pattern of each form by placing consecutive numbers under the appropriate headings. (See Figure 13.)

Figure #11

CATEGORY SUMMARY SHEET

F	Forms received from HEW, OE, OCR, or any other federal agency; with the form being returned to the requestor.	S	Forms received from the State Department of Education, or any subdivision thereof: or any other state agency, with the form being returned to the requestor.	L	Forms designed and distributed within the LEA, for use only within the LEA.

INFORMATION COLLECTION FORM

Item Number	Form: Title, Number, or description Dates: Received & Returned	Origin of Request						Data to be used by, form returned to						Request Received from						Initial recorder of data necessary to complete the form								
		HEW	FED	SDE	StAGCY	LEA ADMN	LEA TCHR	HEW	FED	SDE	STAGCY	LEA ADMN	LEA TCHR	FED	STATE	SUPT	CENT OFF	PRIN	TCHR	CENT OFF	PRIN	COUN	SECY	TCHR	STUD	PARENT	AIDE	

Figure #12

Name_____

Date Collected_____

Date Filed_____

FLOW PATTERN OF INFORMATION

Indicate by the use of numbers the sequential flow for each item you have listed on the Information Collection Form.

ONLY INDICATE WHAT YOU KNOW TO BE FACTUAL AND NOT ASSUMED

ITEM NO.	TEACHER	TL EE AA MD E R	GL RE AA DD EE R	UC NH IA TI R MA N	DC EH PA TI R MA N	TA EI AD CE HE R	DS EE PC T.Y	BLDG. SECY REG.	PS RE IC N.Y	PO RF IF N.I C E	STUDENT	DIR. INST SECY	C O O R D SECY	S. E.	DIR. INST.	CS OE OD R D	SS UE PC T.Y	SUPT.	SDE FIN.	SDE INST	SDE EXC CHD	SDE VOC	SDE FSV	SDE SUPT.	SDE	HEW	COUNS.	SELF	PRNT

b. Conduct orientation sessions using the grade-building level as the base level of interaction. Explain the format of each of the instruments and how each staff member is to complete the surveys. The collection of the survey instruments does not take place at the orientation sessions. It should take your staff about one week to complete the surveys. It is recommended that you spend approximately thirty minutes a day until the surveys are completed. If your instructional staff have prep-and-plan periods during the school day, I suggest the utilization of such time for the completion of the surveys.

Remember, all collection activities should follow the same organizational pattern utilized in the election of representatives. Also, explain what the various initials represent in each column on Figures 12 and 13.

Step #7: Analyses

a. Information
b. Use

Recommendations For Step #7

a. The responses obtained from the surveys could be disturbing. Do not panic! Your situation is not unique!

The information you have collected should identify the extent of knowledge your staff possesses pertaining to each and every form your system is presently using. These instruments will also identify the specific flow pattern of each form, and pinpoint the initiator and "holder" of each form.

b. The identification of the initiator and holder of each form should assist you in developing your file system for the student information system, and the appropriate location for files to be housed. Not all files belong at the central office.

These instruments should have identified all the "known" forms you are presently utilizing for the collection and reporting of information. Fortunately, or unfortunately, it will also highlight the knowledge or lack of knowledge, use or misuse, and duplications of forms and information. Regardless, it does identify problems that you can now work with your staff in changing.

CHAPTER VII

Activity #6: Identification of Data Needs

This activity is designed to identify: each student information datum presently being collected; each student information datum NOT PRESENTLY AVAILABLE to staff members, but is needed by them; the priority of need placed on each student information datum by all staff members; and a rank order listing of all the student information data needed by the school system. The product of this activity is not only your system's basic data base, but is also the basic data needed to design your student information system.

Major Steps

1. Forms
2. Staff
3. Lists
4. Priority
5. Tabulations
6. Lists
7. Review

Step #1: Forms

a. Gleen
b. List

a. If you judiciously sorted out the irrelevant forms during Activity 5, you are ready to identify the student data needs of your school system. This data is dictated by the remaining forms.

   If you maintained your forms as instructed in Activity 5-Step 3, you are ready to extract your bits of student datum. Peruse each sub-categorized division of forms to identify and list each requested datum of student information. As you list each datum you should indicate whether it is a federal, state, or a local request (F, S, L). All listing of datum must be recorded by category - by subcategory. You should also maintain a "frequency of request" count. (See Figure 14.)

b. There should be three (3) lists as products of Step 1-a; federal, state, and local. Each of these lists should be subdivided into areas that reflect the system's organizational structure. The coordinator should have recorded the frequency of request for each

Figure #14

DATUM TABULATIONS

Code: 1 Request/Form 1st Request = 1 2nd Request = 2 11th Request = 11	Duplicate Requests 1st Dupl. Request = 2 5th Dupl. Request = 6	137/30

DATUM ITEM LEVEL	FEDERAL REQUESTS	STATE REQUESTS	LEA REQUESTS

datum. (This identifies both the numerical count of how many bits of datum are being requested, and the numerical count of the duplicate requests for a single bit of datum).

Step #2: Staff

a. Orientation
b. Information

Recommendations For Step #2

a. The coordinator should conduct an orientation meeting with the representatives. Although the meeting should only last between ten and twenty minutes, the end product is of significant importance. The representatives are to be instructed to request from each individual they represent a list of student information that they need, but are not presently being provided that information for one reason or another. Those employees not having an informational need should merely sign their name and write "none." (See Figure 15.)

This exercise has identified the "missing link", so to speak. You have now identified that information about students which staff personnel have never had, but always needed. Take the submitted lists and compile an alphabetical listing of datum by organizational level. Indicate the frequency of request also.

Step #3: Lists

a. Composite
b. Alphabetical
c. Advisory Committee

Recommendations For Step #3

a. You now have a set of lists from Step 2-a and b that must be compiled into one composite list of datum; by category, by subcategory.

b. Using the composite list developed in Step 3-a; develop an alphabetical list of all datum included in the composite list. Refer to your frequency of response tabulations and record the count to the right of the appropriate datum item.

c. The coordinator should meet with the Advisory Committee as soon as the lists are complete. The lists should be discussed at this meeting and plans developed to provide additional analysis after the staff has prioritized their needs. The procedures for prioritizing datum should be covered thoroughly.

Stet #4: Priority

a. Format
b. Orientation

Figure # 15

TEACHER NEEDS

DATA DESCRIPTOR	DESCRIPTION OF DATA NEEDED AND THE PURPOSE FOR OR INTENDED USE OF SAID DATA

Recommendations For Step #4

a. Develop an instrument that lends itself to the prioritization process. If the instrument is cumbersme you could obtain some biased data. Experience taught us that the alphabetical list (frequency of responses not included), with sufficient space to record one's priority, was the desired format. (See Figure 16.) An uneven number of values that could be assigned to an item was preferred over an even number of values; five values was preferred over three or seven. The values should range from the low priority of "no need" to the highest priority of "absolutely essential."

b. Orientation sessions should be conducted in every building. The staff members are instructed to merely place an X in the box which reflects the priority that individual places on that datum item as it impacts upon the individual's daily job performance. Collect the responses by the organizational structure utilized in the process of electing representatives.

Step #5: Tabulations

a. Responses
b. Organizational
c. Other

Recommendations For Step #5

a. All responses should be tabulated by item, by organizational level. The response value should be calculated by adding the priority value given that datum item by each respondent, and them dividing the total priority value by the number responding to a datum item, and then by the total number responding by organizational level. (See Figure 17.)

b. The organizational-level responses must be tabulated and calculated because there are differences within a system's organizational structure about what datum is important at what level. You should investigate the responses in as many ways as there are possibilities. Remember, the products of this activity, and Activity 5, identify your basic data needs.

c. Another product generated at this time should be a comparative list depicting the "frequency of request" and the average value obtained by each datum item. This should be compiled by item, by organizational level.

Step #6: Lists

a. Rank Order
b. Other

Figure #16

PRIORITIZATION OF NEEDS FORM

ITEM	5	4	3	2	1	ITEM	5	4	3	2	1	ITEM	5	4	3	2	1	ITEM	5	4	3	2	1	ITEM	5	4	3	2	1
1						29						57						87						113					
2						30						58						86						114					
3						31						59						87						115					
4						32						60						88						116					
5						33						61						89						117					
6						34						62						90						118					
7						35						63						91						119					
8						36						64						92						120					
9						37						65						93						121					
10						38						66						94						122					
11						39						67						95						123					
12						40						68						96						124					
13						41						69						97						125					
14						42						70						98						126					
15						43						71						99						127					
16						44						72						100						128					
17						45						73						101						129					
18						46						74						102						130					
19						47						75						103						131					
20						48						76						104						132					
21						49						77						105						133					
22						50						78						106						134					
23						51						79						107						135					
24						52						80						108						136					
25						53						81						109						137					
26						54						82						110						138					
27						55						83						111						139					
28						56						84						112						140					

Figure #17

DATUM SCORE TABULATIONS

DATUM _____ ITEM NO. _____

Organizational Level	No. Pers.	Priority 5	4	3	2	1	Total Value	Minimum Score	Indications In	Out	Ques	Yes	No
Administrative													
Central Office													
Primary													
Middle													
Jr. High													
Sr. High													
TOTAL													
Teachers													
Primary													
Middle													
Jr. High													
Sr. High													
TOTAL													
KDG													
1													
2													
3													
4													
5													
6													
7-8													
9-12													
Supportive													
Counselors													
Support													
Spec. Ed													
Title I													
Food Svc													
Transport													
Secretaries													
GRAND TOTALS													

Recommendations For Step #6

a-b. After all calculations have been performed a rank order list of datum items should be compiled. This listing should reflect or note significant differences between organizational-levels values placed on datum items. Incorporated in the reporting format of this list should be the "frequency of request" information identified when Step 5-c was completed.

Step #7: Review

a. Results
b. Priority
c. Tabulate

Recommendations For Step #7

a. Return to the buildings and present the appropriate results to the respective groups. Do not reveal the results of other organizational levels at this time.

b. Ask if that group would prefer to change the priority rating that was calculated from their first responses. If so, make the necessary changes immediately.

c. Retabulate the values given to any datum item; and recalculate the value for the group and the organizational-level value.

Prepare all documents for presentation to the Advisory Committee.

CHAPTER VIII

Activity #7: Refinement of Data Needs

The involvement of the Advisory Committee at this stage of the development activities is crucial to its future success. It is during this activity that the Advisory Committee is critically engaged in the decision-making process -- the determination of what data is to be included in the student information system.

Major Steps

1. Preparation of Findings
2. Presentation of Findings
3. Selection of Data
4. Data Calendar
5. Orientations

Step #1: Preparation of Findings

a. Requested Data
b. Needed
c. Comparisons
d. Priority List

Recommendations For Step #1

a. The coordinator should develop a short presentation pertaining to the products of Activities 5 and 6; the lists of data requests identified as being either federal, state, or local. A list of all data requested and checked (X), as to whom requested that datum, is the more informative manner in which the information can be presented. Being presented in this format also readily identifies those bits of datum that are mandated; they must be included in the system.

b. Arrange the "staff identified needs" so that they can be readily compared to the requested data. An alphabetical listing is the preferred format. Whatever format is adopted remember to indicate the orginizational level from which the specific need arose.

c. Format 7 a-b to show the similarity of "needed" data. An alphabetical list of datum items with column check spaces indicating federal, state, local, staff need, and frequency of request is recommended.

d. Use the composite list that was distributed to staff members for the purpose of prioritization , to assist in your explanation of the selection of datum to be prioritized.

Step #2: Presentation of Findings

a. Preliminary Findings
b. Priority Rankings
c. Changes
d. Comparisons

Recommendations For Step #2

This is a lengthy session! It is highly recommended that this session be held on a Saturday, and food services be provided for at least two meals.

a. The coordinator reviews the materials developed in Step 1-a, b, c and d. Even though the majority of the members of the Advisory Committee probably were in attendance at the meetings pertaining to each specific item you are presenting, all of them might not have been present. This review summarizes the developmental activities and their products up to the time of prioritization. These materials are essential to the completion of this activity, therefore, be as explicit as possible.

b. Review the ranking of each datum. The review should initially depict the rank order of each datum independently. Further analytical review should include how each grade level and/or subject area field prioritized the data; and lastly, how the various organizational levels of your school system prioritized each datum. DO NOT make any comparitive statements at this time!

c. Briefly explain the procedures followed in the "change of priority" process. Identify the data which was changed to a higher or lower priority.

d. This phase of Activity 7 is the most difficult to conduct. It could bias the selection process. The coordinator should compare the rank order of each datum; by grade/subject, by organizational level, and against the list of needed data. It is recommended that you present the comparisons in the order as listed. When presenting the comparison of rank order to "needed data" you will undoubtedly encounter some areas of controversy. The rank order indicates little, or no use of the information. In these instances you will have to refer back to the organizational level's rank ordering of that datum.

Step #3: Selection of Data

a. Mandated
b. Choice
c. Conflict

Recommendations For Step #3

a. The Advisory Committee should vote, datum by datum, to accept or reject each item of information. Those items which are necessary to maintain because of mandated reasons should be covered first. Refer to your list of datum items and where federal, state, and local columns were checked for that datum you have no choice; therefore, it must be accepted as part of the data base. Even though the Advisory Committee has no jurisdiction over the acceptance - rejection of forms disseminated by federal and state agencies to their local system, it can make known its opinion to the appropriate agency.

b. After eliminating the mandatory items, the Advisory Committee must vote on each of the remaining datum. The choice of acceptance - rejection should be based on the averaged score obtained through the priority process. There will be items which are questionable. (See Figure 18)

c. When the Advisory Committee encounters an impasse concerning any bit of data; it should postpone any decision until a reassessment of that item is conducted. There should not be many items falling into this category.

Step #4: Data Calendar

a. Comparisons
b. Format
c. Acceptance

Recommendations For Step #4

a. Having eliminated all the extraneous bits of datum, you are ready to develop the yearly data calendar. It is more appropriate; at this time than at a later date, to decide what data-forms are to be utilized within the school system. The development of a yearly data calendar should eliminate the extraneous forms presently being maintained in your system. Some staff personnel resist change, but the calendar should bring sufficient pressure upon these individuals to ensure conformity to the desired acquisition program.

The Committee must refer to the instrument used in Activity 5 for comparative purposes. Based upon the Committe's decision concerning each datum item, and the information identified on the Activity 5; the collection, maintenance, and reporting of data should be identified.

b. The format of the data calendar should identify every datum bit and/or collection instrument required by either federal law, state law, federal policies, state board policies, or your local system. Although there

ANALYSES OF DATA

Datum Item	Level			Organizational Level				Vote		Score	Rank	Comments:
	F	S	L	E	M	Jr	Sr	I	O			

Figure #18

are innumerable data divisions which could be listed in the calendar; it should include at least the following categories: dates, received and submitted; form or datum; title or discription; organizational unit responsible for recording the data and/or completing the form(s); and, if it is a form, to whom the completed form should be sent.

c. The calendar informs every employee as to "what, when, and who concerning their informational responsibilities. It also places a limitation on capricious requests for information - not on the calendar, no response. As "users" of the calendar the Advisory Committee sits in a most unique position; their adoption of the calendar mandates their own conformity to its use. The acceptance of the yearly data calendar will have a significantly positive impact upon your school staff. (See Figure 19)

Step #5: Orientations

a. Committee Action

a. The final phase of this activity is to report back to all employees the findings and decisions of the Advisory Committee. The nature of the orientation meetings should be informative only.

YEARLY DATA ACQUISITION PLAN

Date		Form		Completion Level	Returns		Comments
Mo	Dy	Form No.	Description		Send To	Division	

Figure #19

CHAPTER IX

Activity #8: Prepare Input-Output Forms

In a manually operated system, as developed in the pilot school system, the input forms and output forms can be so formated that one form serves in both capacities simultaneously. This is not true for automated processing systems. Regardless, all input forms should be designed to collect data which is basic in meeting the request burden of your school system.

A thorough understanding of the concept of a manually operated card system, its flexibility and limitations, and a well-developed usage of sorting techniques should be provided each member of the Advisory Committee; if the goals of the system are to be obtained.

Major Steps

1. Orientation
2. Data Categories
3. Card Format
4. Mock-Up
5. Proof
6. Publication

Step #1: Orientation

a. Conceptual
b. Sorting

Recommendations For Step #1

a. Educate the members of the Advisory Committee. Develop to the highest level possible, on the part of each committee member, an understanding of the conceptual framework undergirding a manually operated system that utilizes hole punching and key-sorting, techniques. Expose each member to a variety of examples which depict these basic concepts. The committee members must feel confortable when addressed with questions pertaining to a single-hole punch, multiple-hole punching, field-grouped data, needling, key-sorting, input-output, etc. The more sophisticated the members become, the easier the developmental process becomes. There is no point in continuing this activity until you are satisfied that the committee members are capable of continuing.

b. Once the committee members are familiar with the basic design of a manually operated system, provide them with numerous exercises involving sorting techniques. The initial exercises should be limited to single-hole identifications, then double-hole deep; and eventaully, multi-hole sorting. All of these exercises should be encompassed in the final exercise which should be designed to retrieve data through a multi-hole deep and multi-faceted inquiry. Hopefully, the sorting exercises will not only develop a high level of sophistication in sorting techniques, but also will strengthen their respective understanding of the basic concepts involved in this type of system.

Step #2: Data Categories

a. Sorting
b. Descriptors

Recommendations For Step #2

a. Each datum of the proposed data base has to be sorted out according to the nature of that datum. The products of previous activities have enabled you to compile a list of each datum necessary for your system to be "complete." All of the demographic data pertaining to an individual family should be separated into one category, achievement data in another, health data in a third, and so forth. Once you have assigned each datum to a category make a list of all the data in that category. Review the placement of each datum. If one or more of the categorical lists containing but a few entries; consider assigning these data to another related list, or combining lists. The object is to reduce the lists to the fewest possible number; yet, still retaining their categorical characteristics. There is no maximum or minimum number of lists that should be compiled. The "number" of lists is an indicator as to the number of input cards you may possibly need to reflect the data needs of your school system.

b. Using HEW's Handbook V, "Student/Pupil Accounting," check each datum against the divisions identified in the Handbook. If you have data categorized in one field that the Handbook identifies as being reported in another; change the placement of that datum to the appropriate list. Identify or describe each datum by the use of a word, or as few words as possible; this is the descriptor of that datum. Write the datum and its descriptor on a 3" X 5" index card. At the same time you are identifying the appropriate descriptor, Handbook V will provide you with the unique numerical code number for that descriptor. Place this code number on the appropriate card. Do not be alarmed if all data on a categorical list cannot be identified within any one given section of the handbook. Search until you find the most appropriate numerical code for each datum. Affix each datum's numerical code to its appropriate index card.

Step #3: Card Format

a. Hole Punch
b. Innerface

Recommendations For Step #3

a. Before you undertake the activities of Step 3, reassess the capabilities - understanding of the members of the Advisory Committee concerning the conceptual bases of manual systems. You will conserve time and effort while conducting future activities by increasing committee members' competencies now.

   Take the categorical list having the greatest number of datum items and numerate each item. Do the same for the next smallest list; and so on, until every datum has beem numbered. Identify each datum on all the lists that lend themselves to a hole-punch assignment for recording and retrieval purposes. (See Figures 20 and 22). Count the number of hole-punch assignments per list and affix that number to the appropriate list.

b. The remaining data, after identifying hole-punch data, are those datum that should be recorded on the innerface of the card(s). Recheck these items as innerface data rather than hole-punch data. Estimate how many horizontal lines will be required to adequately record these items. Repeat this process for each of your categorical lists.

Step #4: Mock-Up

a. Numeration
b. Lines
c. Lay-out

Recommendations For Step #4

a. The total number of hole-punch data, and the amount of data to be recorded on the innerface of the card are important determiners of what type of card you should use, and the overall size of the cards. All the cards must be the same size and shape.

   You have already identified the total number of hole-punch data for each list, now compute the average number of hole=punch data for all lists. Select a pre-punched sample card that contains no fewer outer-edge holes than the average you just computed. Starting in the upper right-hand corner and moving counterclockwise around the card, consecutively number the holes on the outer edge of the card. (See Figure 20). These holes represent the total number of informational groupings that are possible for that card.

Figure #20

HOLE NUMERATION

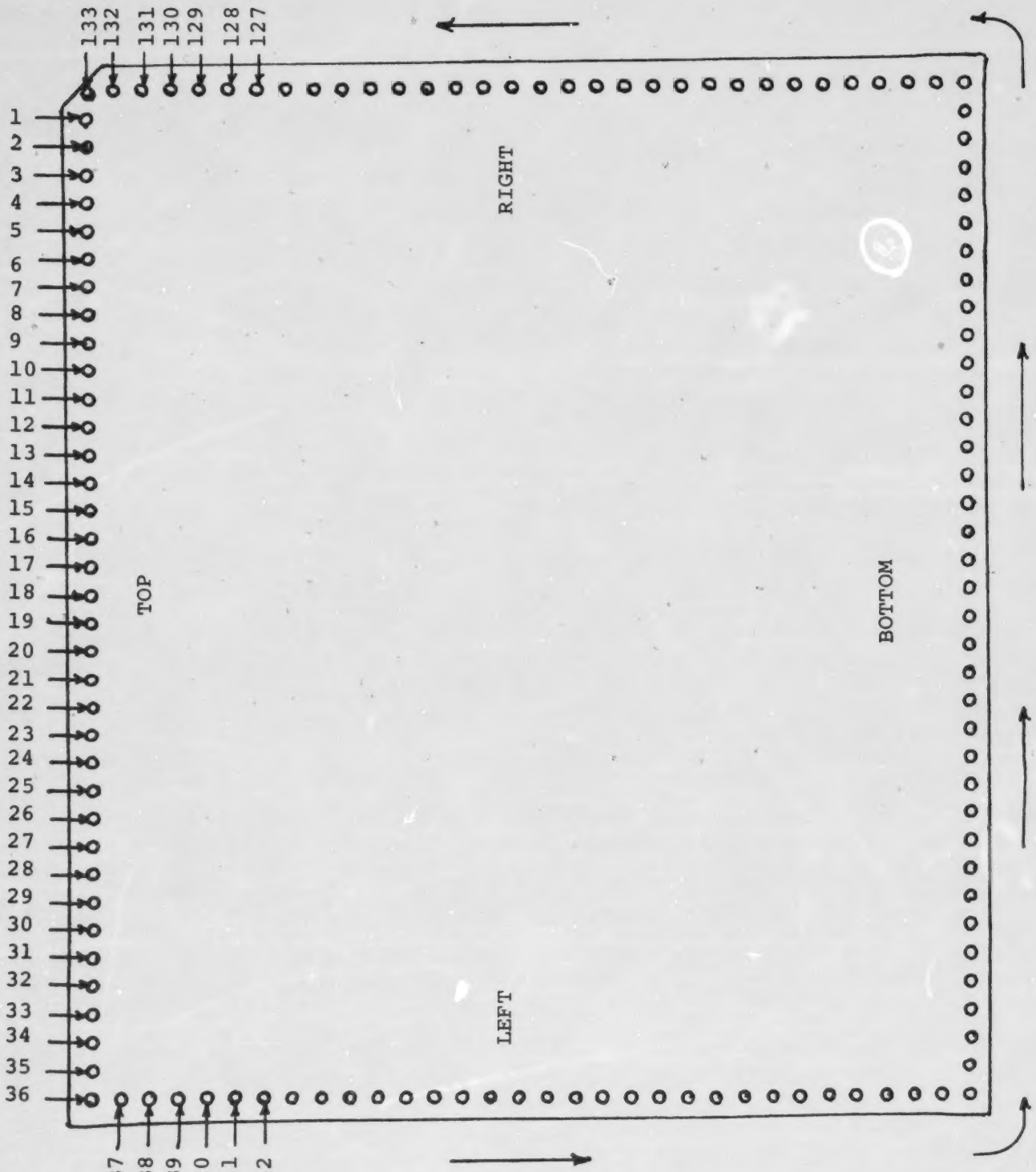


Figure #21

LINE LOCATIONS

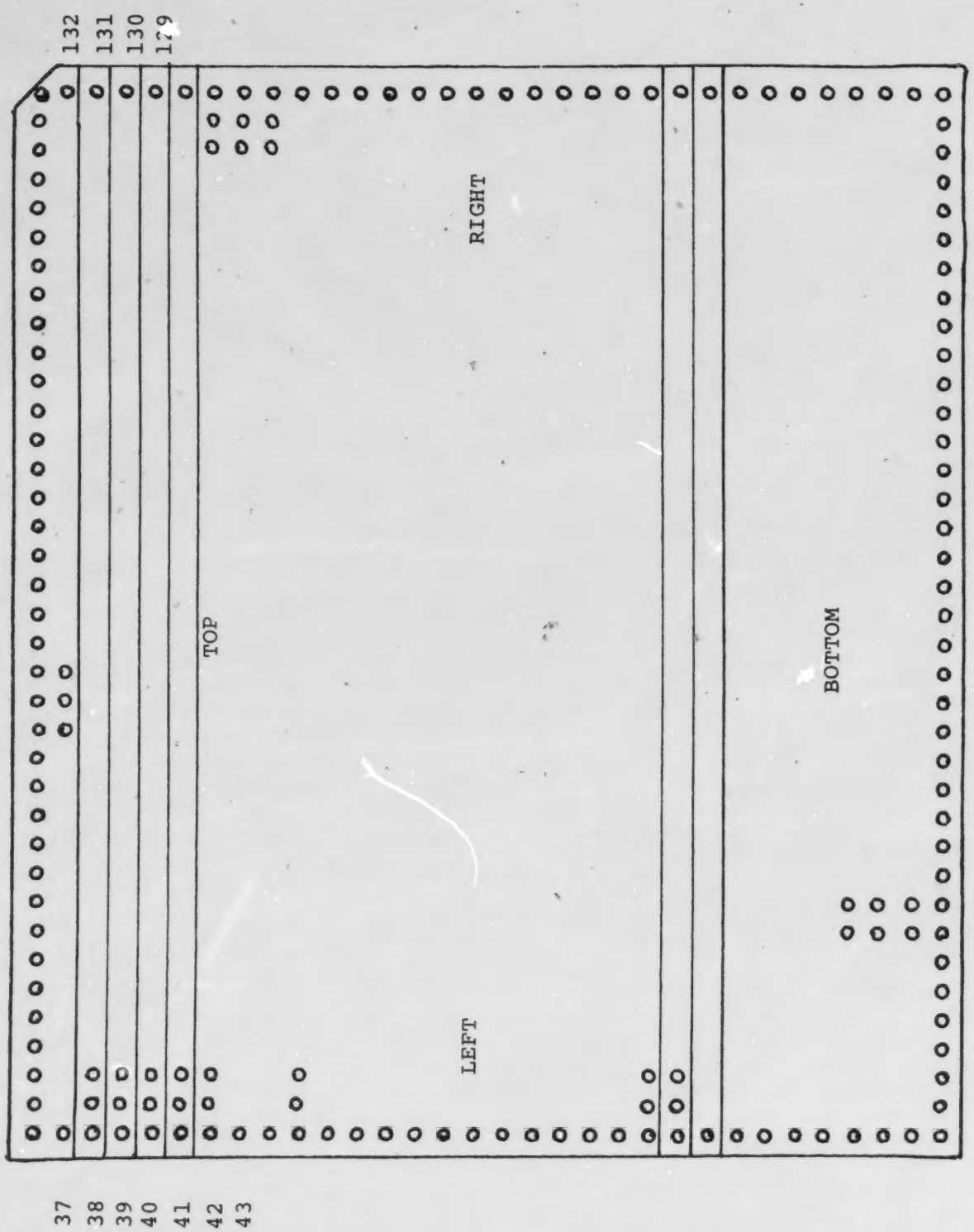


Figure #22

MULTI-HOLE NUMERATION
AND
GROUPED DATA

They are referred to as hole columns. Having numbered the holes and knowing the total number of hole-punch data for each list, you can determine whether it is necessary or not to use multiple-hole punching for data contained in any or all lists. Ethnic category, sex, grade-in-school are examples of data that lend themselves to multiple-hole punching. (See Figure 22) Assign each datum or grouped data to a hole column. Record that hole column number on each datum's index card. If there are unassigned hole columns, it is best to assign them to those areas of data that you suspect will require additional data sometime in the future.

b. Card-lines are identified by hole column numbers. (See Figure 21 .) Lines are read from the top of the card down, and left-right of the center. Assign a line or line segment to each datum that requires recording on the inner face of the card (See Figure 21 .)

c. Construct a lay-out for each of your categorical lists - in pencil. Rearrange the datum/data when and where necessary. When you have "completed" the mock-up of each card, check it for the continuity of data.

Step #5: Proofs

a. Copy
b. Verify
c. Experimentation

Recommendations For Step #5

a. When you are satisfied with your mock-ups, make photostatic copies of each mock-up and send the originals to the selected vendor for proofs. The vendor should be alerted to the criticality of the time element, and that production begins only after a final approval of proofs. The vendor usually keeps the mock-up, therefore you need to have the copies to verify the proofs.

b. Check the proofs when they are returned! Vendors do make mistakes! Check each proof and verify that: all items have been included, hole and line entries; hole columns are correctly numbered, multiple-holes are properly identified, category data is titled correctly; all innerface data has been included, and are situated on the card where indicated on the mock-up; designated abbreviations have been used; and all words are correctly spelled. If there are any mistakes: Make the appropriate revision(s) on the proof copy; itemize each revision on a report which should accompany the proof when it is returned to the vendor; and, make a photostatic copy of the revised proof.

c. Experiment with the proof copies. Verbally walk through representative federal, state, and local forms to verify that the cards; as designed, provide accessibility to the necessary data. If you are not satisfied that the card(s) perform the intended function you must revise them -- the data must be accessible.

Step #6: Printing

a. Verify
b. Purchase
c. Other

Recommendations For Step #6

a. When you are satisfied that the card(s) do perform their intended function, send the revised proofs to the vendor and request copies of the final proofs. Remember to instruct the vendor not to initiate production until "final approval" has been received. Upon receipt of the final proofs follow the same procedures utilized in steps 4-b and c.

b. Make copies of the approved "final proofs." Submit a purchase order, accompanied by a statement of final approval, for a specified number of cards. Bid this item! (See Figure 23.)

c. Allow six to eight weeks for the printing of your materials. There are activities to be conducted during the printing interval. One of these activities is the continuance of key-sorting exercises with members of the Advisory Committee. I cannot over-emphasize the importance of these people being well-versed in the conceptual design of the system, and each member being well-trained in sorting techniques. Having a "trained" individual in close proximity to where problems could occur is a positive preventive measure. Anxiety levels can be maintained at minimal levels when your staff knows that the majority of their questions can be answered by a person within their own building.

Figure #23

SIS MANUAL CARD KEY SORT
DATA PROCESSING SYSTEM

Scope - These specifications are intended to set forth the minimum standards for the development of a Student Information System for the Abbott City School District and shall be known as the "Student Information System - Manual Phase." The standards set forth herein may be altered whenever the Abbott City Schools' Board of Education upon recommendation of the Abbott City Schools' Superintendent of Education finds and/or anticipates unusual circumstances to warrant such changes.

Design - This system shall be a card system, containing data elements pertaining to student information, which shall have basically the capability of being manually key sort massaged in manipulating data for retrieval purposes. The machinery shall have the capability of gang-punching from one-hole to four-hole deep information elements.

Materials

1. Card: Size - 8 1/2 by 11 6/10 inches
   Stock - Royal McBee 1C140 or equivalent
   Ink Color - 10 different colors
   Punching - single, double, triple, and multiple punching required on all cards (K-5)
   Reverse Print , extensive copy work required on all cards (K-5)
   Registration - from card to card registration has to be exact
   Copy - art design on each card is different
   Quantity - 5M per copy (card)

Equipment

Quantity	Description
7	Royal McBee Desk Model Groover or equivalent - size - 6 3/4" by 7 5/8" with 1" depth
150	Royal McBee Key Sort Hand Punches Model 5227 or equivalent - for multiple row punching
150	Royal McBee Alignment Block Model 5301 or equivalent
150	Royal McBee Key Sorters Model 5009 or equivalent - adjustable, manual single needles.
10 boxes	Royal McBee Card Savers Model K4SD or equivalent - single or double card savers

System Specifications

1. The Vendor must design and install a manual key sort card capable of retrieving student information for the Abbott City Schools. The successful bidder will be given rough draft information from which a manual system consisting of five (5) different cards shall be designed; the five (5) cards shall be designed, art work performed, produced in quantities of five thousand each, and shipped in sufficient time as to be received by Abbott City Schools no later than September 22, 1975.
2. Personnel must be available on immediate call to work with the individual school system, as well as, the State Department of Education in the installation and support of the system.
3. Interested bidders may obtain information samples from the Superintendent of Abbott City Schools.
4. Bidders shall submit a sample card along with their bid. Bids shall be opened at 2:00 P.M. on August 12, 1975, in the offices of Abbott City Schools.

CHAPTER X

Activity 9 - Input-output Dictionaries

This activity is the key to the accessibility of the data you intend to collect. The completed dictionaries provide a card by card, hole by hole, line by line, description of each datum collected. The dictionaries include all the elements necessary for the development of the filing system.

Major Steps

1. Format
2. Descriptions

There are only two steps listed for this activity, but let me assure you it will consume many man-hours to complete the activity -- it is exacting and tedious work. Do one card at a time!

Step #1: Format

a. Titles

Recommendations For Step #1

a. The dictionaries MUST coincide with the hole-column numeration identified in Activity #8. Starting in the upper right-hand corner of the card and moving counterclockwise you must identify what datum is found in each hole-column. For those hole-columns not containing data you simply use the word-BLANK. The proper format for the dictionaries is presented in Figure 26. The far left-hand column indicates the hole column or line; inclusive holes for grouped data, and specific hole/multi-hole for individual datum. Reading from left to right, the next column contains the descriptor for that datum item. The descriptor is followed by a definition (usually taken directly from Handbook V). The last column contains the codification number for that datum.

Step #2: Descriptions

a. Information

Recommendations For Step #2

a. Remember, a hole column can contain more than one datum bit. A hole column that does contain more than one datum bit is termed as being multi-hole. Data of a similar nature are grouped together. (See Figure 24.) The hole column identifies where that datum/data are located on the card. The multi-hole specifies what datum is contained in each hole within a hole column.

Innerface lines are identified by two sets of numbers; and either L(left) or R(right), if the line segment covers only half the card. In such a case all line information for the left side of the card is identified first, and this is followed by all line information contained on the right-hand innerface of the card (See Figure 25).

Give the card and its dictionary the same title. It is highly recommended that as you compile the dictionary for each card you also complete the compilation of data necessary for the filing system; the card title, and line/hole location of the datum, and the federal codification number.

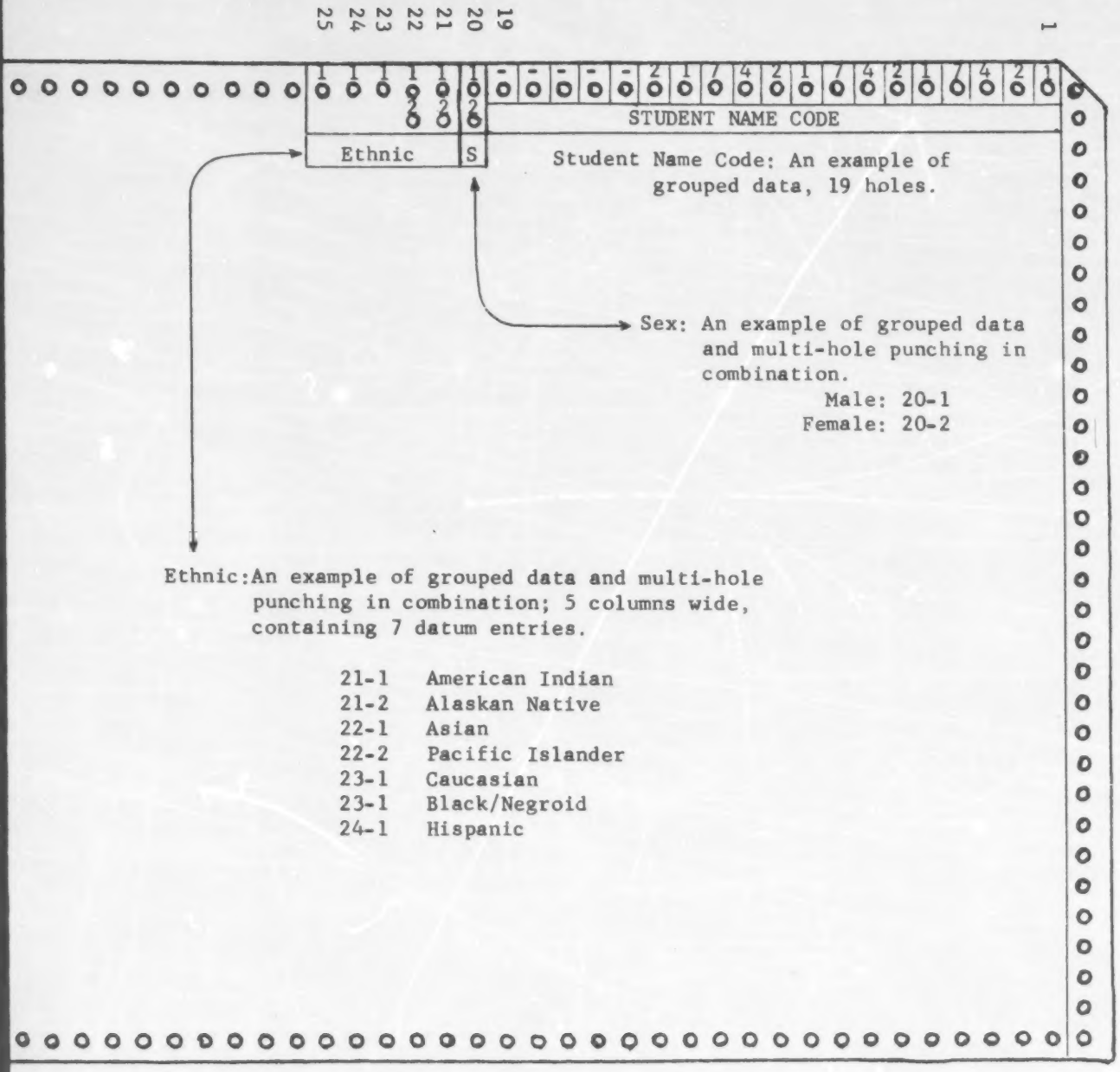

25 24 23 22 21 20 19 1
STUDENT NAME CODE
Ethnic
S
Student Name Code: An example of grouped data, 19 holes.
Sex: An example of grouped data and multi-hole punching in combination.
Male: 20-1
Female: 20-2
Ethnic: An example of grouped data and multi-hole punching in combination; 5 columns wide, containing 7 datum entries.
21-1 American Indian
21-2 Alaskan Native
22-1 Asian
22-2 Pacific Islander
23-1 Caucasian
23-1 Black/Negroid
24-1 Hispanic

Figure # 24

Multi-Hole Numeration And Grouped Data-D

Figure #25
Line Location-D

Figure #26

ACADEMIC DICTIONARY

Hole Location	Identification of Data Descriptor	Description	HEW Code	LEA Code
1 - 24	Student Name Code	The number assigned to a student for identification and record-keeping purposes.	10000.10	19-24
25	Sex		13000.00	19-25
25-1	Male		.10	19-25.1
25-2	Female		.20	19-25.2
26 - 30	Ethnic Group	A group with a common cultural tradition and a sense of identity which exists as a subgroup of a larger group.		
26-1	AI	American Indian - a person having origins in any of the original peoples of the Western Hemisphere.		
26-2	AL	Alaskan Native -		
27-1	A	Asian -		
28	B/N	Black/Negroid		
29	C	Caucasian		
30	H	Hispanic		

Line Location	Identification of Data Descriptor	Description	HEW Code	LEA Code
3 - 47R	Student Name	The given name of the student.	10000.10	L3-47
3 - 48R	Parent's Name	The name of the person(s) with whom the student resides.		

CHAPTER XI

Activity #10: Procedural Materials

Having formated the cards, and completed the dictionaries which describe the "what's and where's" of information; you are now going to describe the 'how and when' this data is to be recorded -- procedure statements. Procedural materials must be developed for each card, and all procedural materials should be approved by the Advisory Committee. The procedural statements must identify how and when holes are to be punched, and/or line-location data is to be recorded. Do not expect your staff members to use logical deduction concerning the recording of data on the cards. Your procedural statements should leave nothing to chance.

Major Steps

1. Yearly Data Acquisition Plan
2. Attendance Card
3. Other

Step #1: Yearly Data Acquisition Plan

a. Format
b. Recording
c. Approval

Recommendations For Step #1

a. Refer yourself to the collection instruments used in Activities 5, 6, and 7. These materials should identify all the forms currently being utilized by your school system, the forms' deadlines, and the information necessary to complete the forms. The same information should be available pertaining to internal and external reports that have to be generated. The yearly data acquisition plan should not include instructional "needs" as they arise primarily from the needs of individual teachers.

The format of the yearly data acquisition plan should clearly reflect the month of the year that the data is received, form number, context of the form, when it is to be returned, to whom it should be returned, and any special comments pertaining to the type(s) of data being requested. (See Figure 19.) The plan should also identify which card(s) should be used in generating the requested information. Every staff member should receive a copy of the yearly data acquisition plan.

b. It would behoove administrators to thoroughly indoctrinate their respective staff members to the content of the yearly data acquisition plan. The plan does not identify how data is to be recorded. It does identify when and what forms/data have to be submitted.

c. Note: When a request for information is received that is not included in the yearly data acquisition plan, the request should be conditionally denied. Conditional denials of this nature must receive an endorsement from the Superintendent, and be accompanied by a special cover letter from the requestor.

Step #2: Attendance Card

a. Procedural Statements

Recommendations For Step #2

a. An example of the content of a procedure statement is provided in Figure 27.

Step #3: Other

a. Statement

Recommendations For Step #3

a. The upper edge of all the cards should contain the same information; therefore, each card is punched in the same manner, and the procedure statements for that portion of the card would be identical. It will save you time and energy if after writing the procedure statements for the upper-edge data on the first card, you make as many copies as there are cards of this portion of the statements.

Again, you must write step-by-step statements instructing individuals on how and when to punch/record data on each of the cards that you have developed.

Figure #27

ATTENDANCE CARD

Procedural Statements

1. Student Name Code: Arrange the names in alphabetical order of all students in any given grade. Assign a numerical code number to each name and punch that number in section identified as the Student Name Code.

Exp. Aaron, John 1
Abel, Jack 2
Brown, Don 3
Cassidy, Hoppy 4

Name Code	Thous	Hund	Tens	Ones	Decimals
	0000 7421	0000 7421	0000 7421	0000 7421	0000 7421

Aaron, John - punch out #1 in ones unit
Abel, Jack - punch out #2 in ones unit
Brown, Don - punch out #1 and #2 in ones unit
Cassidy, Hoppy - punch out #4 in ones unit

French, Bob (56) - Punch out #4 and #1 in tens unit,
#4 and #2 in ones unit
Smith, Harry (811)- Punch out #7 and #1 in hundreds unit.
#1 in tens, #1 in ones unit

Zorrow, Tom (1359)- Punch out #1 in thousand unit,
#2 and #1 in hundreds,
#4 and #1 in tens, and
#7 and #2 in ones unit

* New student enters during the 3rd week of school - Ark, Noah
Abe, Noah (1.7) - punch out #1 in ones unit,
#7 in decimal unit

Assign decimals to students who enter after the initial coding of names has been performed. The decimal value is determined by the proximity of the new name to those already having a code number. Abe is closer to Abel than it is to Aaron.

2. Sex - Hole #25. Punch the outer hole if the individual is a male, do not punch a female.

3. Ethnic Group - Holes 26-30 - Punch out the hole which appropriately identifies the ethnic origin of the individual. Use the dictionary for identification purposes when in doubt.

Aaron, John - Jewish - C - Caucasian
Abel, Jack - Negroid - B/N - Black/Negroid
Brown, Don - Korean - A - Asian
Cassidy, Hoppy - Cuban - H - Hispanic

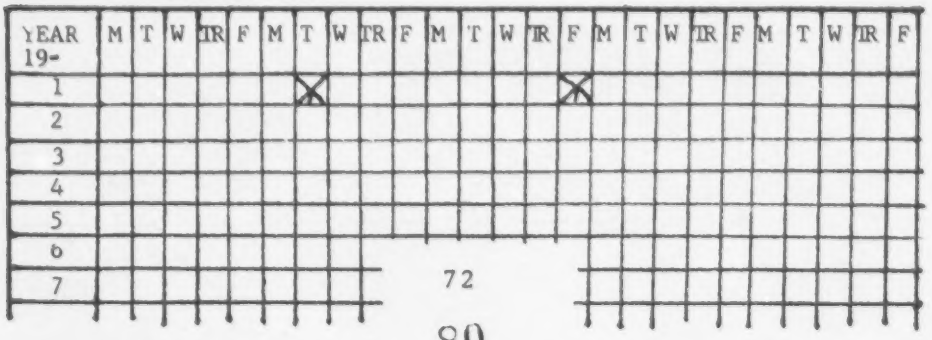
27. Parent's Name: John Aaron's parents live in Germany and he resides with his Uncle, Mr. Ira Newcombe. John's place of residence is 523 Woodbine Ave., Rochester, N.Y. 14623

STUDENT'S NAME	JOHN AARON
PARENT'S NAME	IRA NEWCOMBE
ADDRESS	523 Woodbine Avenue
	Rochester N. Y. 14623

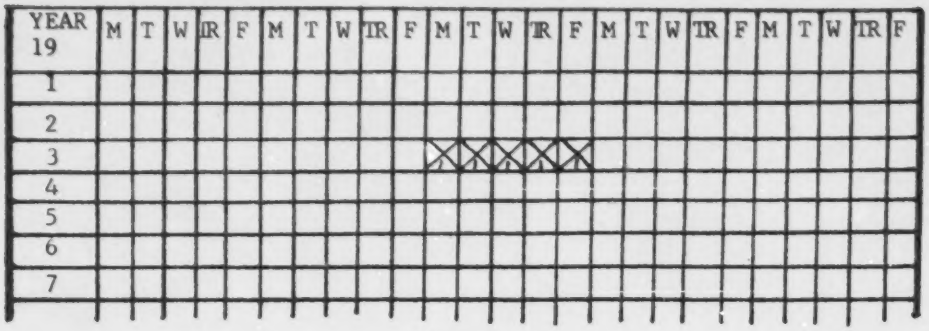
28. Recording Absences: Each row is equivalent to one(1) attendance period. Each column represents a day of the week; Monday is identified by the letter M, Tuesday by T, Wednesday by W, Thursday by TR, and Friday by F.

In the upper-left corner of the calendar is a space for indicating the school year for which the attendance is being reported. The school year 1977-1978 would be recorded as 77.

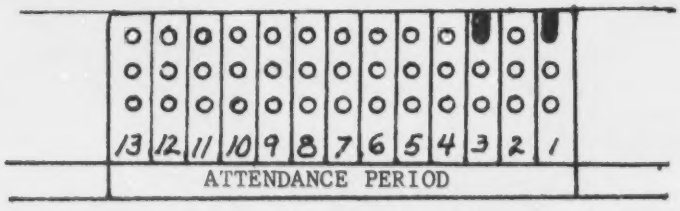
Each day the student is absent you place an (X) under the appropriate day, and in the appropriate row. If the student was absent the second Tuesday and third Friday of the first attendance period, these absences would be recorded as follows:



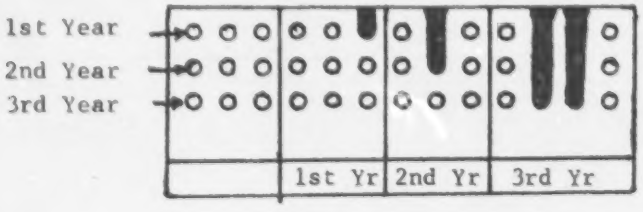
The record of a student that was absent for an entire week during the third attendance period would be recorded thusly:



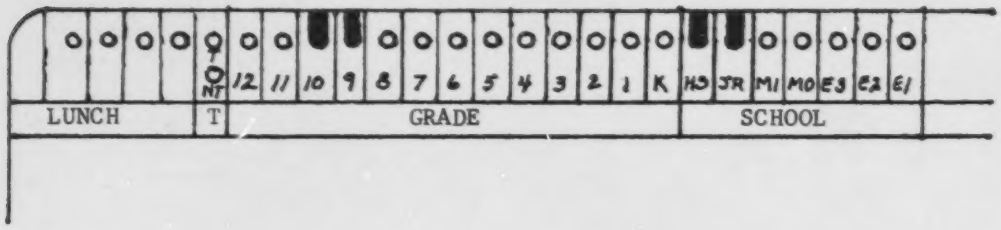
The first time a student is absent during an attendance period, you punch the hole corresponding to the Attendance Period in which the absence occurred. Using the information given in the two preceding paragraphs as examples, the Attendance Period portion of the card would be punched as shown:



Three edges of the card have multi-hole columns; each column is three holes deep. Each of the three holes represent a year. The first year the card is used to record attendance data, you enter the data in the outermost hole; the data for the second year's use is entered in the middle hole; and the third year's data is entered in the innermost or third hole deep.



Data recorded in the upper edge of the card is updated by merely punching the next highest grade level or building when the promotion occurs.



Hole-punch data that has been recorded incorrectly is altered through the use of hole savers. Aline the hole saver directly over the holes containing the incorrect data and press until the adhesive backing adheres to the card. Do not forget to enter the correct data once you have completed the correction process.

CHAPTER XII

Activity #11: Field Testing

Other than yourself and the local coordinator, the most informed people concerning the development of the Student Information System are the members of the Advisory Committee. Because the members of the Advisory Committee are the most informed they are the logical starting point for field testing the materials that have been developed thus far.

Major Steps

1. Advisory Committee
2. Orientations
3. Advisory Committee

Step #1: Advisory Committee

a. Review
b. Recommend

Recommendations For Step #1

It is during this activity that you reap the benefits of the Advisory Committee's extensive involvement in some of the preceding activities. You have received your card(s) and are ready to begin instructional orientation programs; but, you must proof all materials prior to their distribution. Have the members of the Advisory Committee check every item in the dictionaries against their respective card. It is recommended that you assign two members to proof each card; one to read the description from the dictionary, and the second person to verify the correctness of the hole column or line segment. Make note of all discrepancies and recommended changes--these will be discussed later in this activity. Secondly, have the committee "walk through" the procedural steps for each card. Construct a deck of cards by having the members actually punching the information on the cards and recording line segment information on their interfaces; then, have the members sort out requested student data. This in-basket technique not only maintains the member's expertise in key-sorting techniques, but also familiarizes them with the content and flexibility of each card. Again, make note of all recommendations made by the committee.

After reviewing the appropriateness of the dictionaries and the verification of the procedural statements, review each recommendation made by the committee. For those recommendations concerning the dictionaries or procedural statements, which have been verified as being needed changes, make the changes prior to the distribution of materials to other staff personnel. Hold in abeyance those recommendations concerning the cards themselves until you have obtained feedback from all staff personnel.

Step #2: Orientations

a. Cards
b. Materials
c. Feedback

Recommendations For Step #2

a. Again, you should use the smallest organizational groupings possible when conducting the orientation sessions. It was our observation that the larger the group, the lesser the feedback -- the amount, and the content. Be sure to include the representatives of the group for which the session is designed. Do not attempt to field-test all the cards at one time. Use small groups, and present one card at a time. Begin the orientation sessions with an overview of what has been developed (cards), and what your expectations are concerning the products of the orientation sessions. Next, present your first card and explain in detail what information is contained therein -- hole by hole and line by line. The hole-column data is almost self-explanatory, but present a sufficient number of examples when discussing the information contained on the inner face of the card.

b. Thirdly, instruct the audience in the proper use of the dictionaries. Describe the format of the dictionaries and explain how they can be used. Involve the audience by asking them questions and/or to come forward and point out on the card where the dictionary specifies the information is contained. Follow the same procedure when presenting the procedural statements -- ask questions and/or have someone point to the data. Whenever possible, let your Committee member(s) respond to the questions being asked! This technique initiates a pattern buildup - staff members should initially request assistance from their respective representatives.

c. Last, but of utmost importance, have each individual submit "feedback" concerning the materials presented during the orientation session. Even though you could receive similar information from your feedback, make note of all questions raised during the presentation.

Step #3: Advisory Committee

a. Review
b. Recommend

Recommendations For Step #3

A. As you complete the field testing on one card and begin orienting the staff to another, report all the "feedback" on the completed card to the Advisory Committee. The Committee should initially screen the "feedback" material for recommendations concerning the dictionaires

and/or procedural statements. Revise your materials if the recommendations are valid. Re-screen the feedback for recommendations concerning the cards themselves, and incorporate these with the Committee's recommendations. Evaluate the recommendations thoroughly and if the integrity of a card warrants revision - do so. Send the revised copy of the card to the printer and request a new proof.

CHAPTER XIII

Activity #12: Materials Revision

This activity is an "on-going" process! Whenever you encounter evidence that indicates a change is needed, make note of it;and at predetermined time intervals,have these changes reflected in your materials. This will happen -- do not be so naive to think that your initial materials will not require some changes.

Major Steps

1. Advisory Committee
2. Cards
3. Dictionaries
4. Procedural materials
5. Purchasing

Step #1: Advisory Committee

a. Feedback

Recommendations For Step #1

a. The Advisory Committee should be involved in the reviewing of all "feedback," and the development of recommendations pertaining to the informational system. This committee's membership actually is the representative body for the school system and therefore, should be the group to evaluate those comments received from the school system's staff. Chart the positive and negative statements for each card, dictionary, procedure statement, and the system as a whole. Identify the strengths and weaknesses of the proposed system. Separate the feedback information and its analysis according to its respective card.

Step #2: Cards

a. Evaluation
b. Recommendations

Recommendations For Step #2

a. The evaluation of the cards has to be considered first because any changes in their format will automatically constitute changes in their respective dictionary and procedural materials. As indicated in Step 1, all the feedback and analysis for each card must be evaluated together. You should investigate the possibilities of minor changes in

the dictionaries and procedural materials as solutions to "problems" with any card. Caution! Any change in the format of a card is a major change and you must be cautious with such changes at this stage of the developmental process.

b. Once you have completed the evaluation process for any one card you should develop your recommendations pertaining to that card. The recommendations should include the following: the acceptance or rejection of the card as part of the informational system, and the rationale for said recommendation; and, if necessary, changes that should be made immediately; the identification of data items that should be re-evaluated for possible inclusion or omission at a future time.

Step #3: Dictionaries

a. Evaluation
b. Revisions

Recommendations For Step #3

a. Review the feedback and analyses pertaining to each dictionary. Double-check each datum item against its identifiable position described in the dictionary.

b. Dictionaries should be corrected to reflect all datum item changes on the card All "noted errors" should also be corrected at this time.

Step #4: Procedural Materials

a. Evaluation
b. Revisions

Recommendations For Step #4

a. Review the feedback and analyses pertaining to the respective procedural statements for each card. The verification of their application can be checked by actually performing the necessary key-sort application, or the recording of line-segment information.

b. The final revision step is the rewriting of those procedural materials that have been affected by card and/or dictionary changes. Once this step has been completed you are ready to procure your materials.

Step #5: Purchasing

a. Cards
b. Other

Recommendations For Step #5

a. It is strongly recommended that you purchase your cards from a reputable vendor rather than attempt to produce your own -- bid this item. Send

bid notifications to as many vendors as possible. You never know when someone else has developed a new technique or revamped an old application. Let the bid to the successful bidder. Put time limitations on the delivery dates!! Send the final "reformated" card along with your purchase order. See Figure 23 if you intend to rebid the item.

b. If your school system has its own graphic arts or printing facilities you should consider printing the dictionaries and procedural materials yourself. Those systems not having this printing capability should bid these materials.

CHAPTER XIV

Activity #13: File System

Earlier in these developmental processes you conducted activities that produced products which should be of benefit to you now.(Refer to the products of Chapters 6,7, and 8.) These products should provide you with some insights into where when, why, and how the filing system should be designed. There are three important considerations to be kept in mind while designing the filing system. One, the nature of the data being collected and recorded should indicate the most advantageous placement of the cards. Secondly, your organizational structure will have some influence on the structure of the filing system. Last, it has been our experience that the proximity of the files to the "user of the information" has a direct relationship to its use.

Major Steps

1. Cross Index
2. File System
3. File Location

Step #1: Cross Index

a. Descriptions
b. Codes
c. Cards

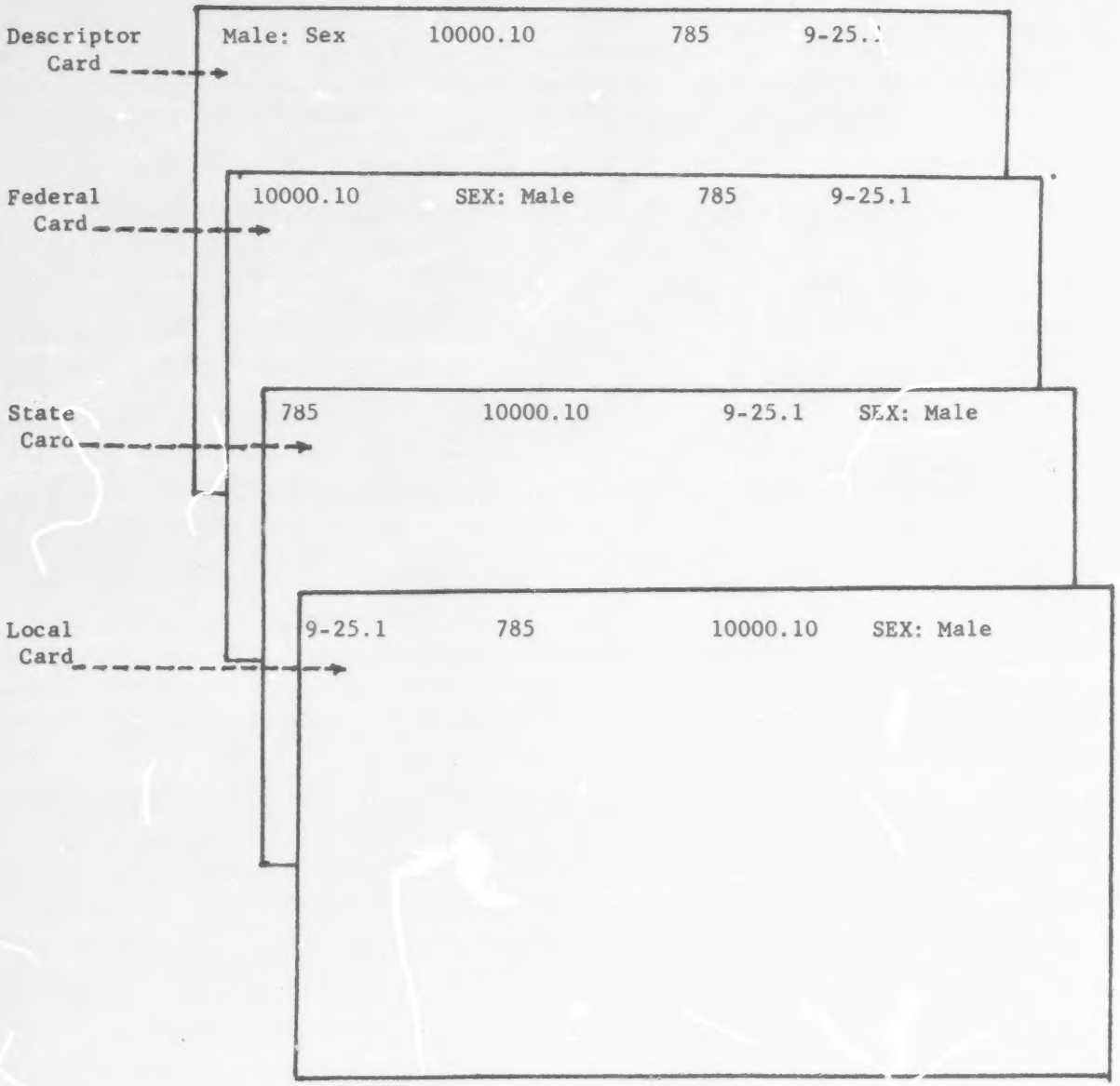
Recommendations For Step #1

a. It is imperative that you develop a cross-reference card file. This provides you with the source documents which enable you to retrieve information using any one of four different sources; federal codes, state codes, local codes or descriptors. Without a cross-reference system you would be continuously conducting exercises in futility when searching for data. The indexed information should be typed on 3" by 5" index cards. The information typed on each card is as follows: a description of the datum item; federal code numbers which have been extracted from HEW's HANDBOOK V; state code numbers; and local code numbers, which actually identify the card, hole location, or line location of that datum.(See Figure 28.)

Our experience with the development of the cross-reference cards prompts the recommendation that your first set of cards should be those whose initial reference is that of a description of the datum item. If the specific datum item with which you are working is listed in HANDBOOK V, copy the description exactly as it is written in the handbook. You

Figure #28

File Card



must develop your own descriptor/description for each datum not found in HANDBOOK V. Be specific.

b. The next two sets of cards that should be developed are those whose initial information is the federal code and the state code. All the information necessary to complete these cards is contained on the descriptor cards. It is merely realigning the data so that either the federal or state code is your initial entry.

c. The local coded-numbers are also contained on the descriptor cards. These numbers reflect the hole column or the line location of the datum being referenced.

Make a final check against each card to verify that the hole or line location on each card actually contains that datum item.

Step #2: File System

a. Selection

Recommendations For Step #2

a. The second step of this activity is a determination of which type of file structure you want. Are the files to be alphabetical, programmatic, decimal or a combination? Your local situation, and your present methods of filing data should receive considerable attention prior to your determination of a filing system. Regardless of which system is adopted, the main objective is to see that "everyone" within your school system maintains the files in like manner.

Step #3: File Location

a. Selection

Recommendations For Step #3

a. The last phase of this activity is centered around the site(s) where the cards are to be housed. Remember, the placement of each card should be as close to the "user" as possible. The majority of the cards should be housed at the "building" level. Practically all of your aggregated data will be generated at the building level. This is due to the fact that most data originates at the building level. Most records are maintained somewhere within the "building" level, so this is where you probably will obtain the greatest utilization of the system. The location of each card should be known to the staff of your school system.(See Figure 29.)

Figure #29

Card Location

Card Title	No.	Placement	Contact Person
Achievement	1	This card is housed in the Principal's office of the building which the student attends.	Building Principal
Attendance	2	This card is housed in the Principal's office of the building which the student attends. The registrar for that building is responsible for recording daily absences.	Within building requests--Principal; other requests are directed to the Asst.. Supt. for Pupil Services
Health	4	This card is housed in the files of the district's Nurse Services which are located in the office of the Asst. Superintendent for Pupil Services.	Coordinator of Nursing Services
Reading	8	This card is housed in the desk drawer or file cabinet of the professional staff person responsible for instructing the student in reading skills.	Reading Teacher

CHAPETR XV

Activity #14: Operating Procedures

This activity consists of writing step-by-step procedures to be followed by all staff personnel when requesting data from the system. Part of Chapter XIII - Activity #12, was devoted to the development of procedural materials that identified the procedures for collecting and recording data; so, now you have to develop procedural statements perta'ning to the retrieval of data from the system.

Major Steps

1. Flow Pattern
2. Lead Time
3. Format

Step #1: Flow Pattern

a. Chain of Command
b. Data Acquisition Plan
c. Review

Recommendations For Step #1

a. Regardless of your position within the school system, other than the superintendent all requests for data must be approved prior to submitting them to the person(s) responsible for the student information system. The approval of a request must come from each organizational level of the hierarchy; with final approval coming from the superintendent, or his designee (See Figure 30.) All requests should be accomanied by a justification for the data. No approval should be given a request that is not justifiable. When a request has been denied and the requestor questions the disapproval, there must be provisions for recourse.(See paragraph c.)

b. After the initial yearly data acquisition plan has been developed, all inclusive data must be approved on a yearly basis. The majority of the items probably are mandated by federal and/or state regulations, and their collection is compulsory.(Even these are subject to change.) Datum to be included in the yearly data acquisition plan should follow the identical approval procedure indicated in the preceding paragraph.

c. A review board should be appointed. The inclusion of members of the Advisory Committee is recommended because these individuals should be the most knowledgeable of the "can and cannot's" of the system. The

review board either confirms the disapproval; or recommends to the superintendent that the request is justifiable, and the system has the capability of producing the data.(See Figure 30.)

Step #2: Lead Time

a. Data Acquisition Plan
b. Ad Hoc

Recommendations For Step #2

a. The yearly data acquisition plan should identify: the dates that request forms are received; dates to be returned; identification of the place the returns are to sent; and to whom they are to be returned. There is no necessity for "lead time" when responding to data requests that are incorporated in the yearly data acquisition plan.

b. Ad hoc requests can produce an undue response burden on your system. The length of time between receipt of the request and the due date of response can be prohibitive. You should always check the request form for a realistic time span for compliance to the request for data. Either return the request form to the sendor with a recommendation that the lead time is insufficient, or disapprove the request.

Step #3: Format

a. Yearly Data Acquisition Plan
b. Other

Recommendations For Step #3

a. The format for the yearly data acquisition plan was developed as a product of Activity 7.

b. The adopted procedures should be subject to continuous evaluation/revision processes. A request burden evidenced in any given office could be the result of inefficient operating procedures. The written procedures must be adhered to by all staff members. Do not permit any circumvention of the adopted procedures.

The procedural statements should address themselves to: the identification of the forms to be used when requesting data; the flow pattern of the form; and where personnel should go to receive their responses.. If there are to be specific individuals responsible for certain types of data, then those individuals must be identified in the procedural statements.(See Figure 31.)

REQUEST - AUTHORIZATION FORM

Figure #30

Title of Data or Description

Requestor's Name

School Name or Department

Date Submitted Mo. | Dy. | Yr.

Date Returning Mo. | Dy. | Yr.

Type of R-A: New __ Revised __ Existing __ Annual ____

Use: Principal __ Federal ___ State ___ Teacher __ Superintendent __ LEA __

Responsibility For Completion: Pupil ___ Parent ___ Teacher ___

Dept. Head __ Principal __ Supervisor __ Central Off. __ Superintendent __

Voluntary __ Requested __ Mandate-F __ Mandate-S __ Mandate-L __

Word Descriptor: Legal __ Legislative __ Program __ Grant __

Attendance __ Census __ Inventory __ Food/Nutr. __ Curriculum __ Certificate

Payroll __ Perform __ Evaluate __ Transport __ Budget __

Personnel __ Planning __ Security __ Maintnce __ Finance __

Response From: Pupil ___ Parent ___ Teacher __

Superintendent __ Central Office __ Supervisors __ Principals __ Department Head __

Adult Education __ Personnel __ Vocational __ Instructional __ Continuing Ed. __

Guidance __ Business __ Budget __ Finance __ Programs __

Title 1 __ Title 3 __ Special Ed. __ Employers __ Employees __

Other __

Justification:

Approval: Yes | No

Signatures: Board of Education (Chairman) _____ Superintendent _____

Principal _____ Department Head _____ Teacher _____

Central Office _____ Supervisor _____

Non-Approval Because:

Figure #31

Attendance Procedural Statements

It is the legal responsibility of the Superintendent of the school system to submit the yearly attendance report to the State Department of Education. It is the responsibility of each building principal to submit a monthly attendance report to the Asst. Superintendent for Pupil Services. In turn; it is the teacher's responsibility to submit, daily, the name(s) of absent students to the principal's office in their respective buildings.

The Attendance Registrar records absences daily on the attendance card of all students being reported as absent. If a student who has been recorded as being absent comes to school late, then the Registrar changes the line indicators to signify that the student was tardy.

In-building requests for attendance information should be addressed to the Attendance Registrar for that specific building.

All other requests for attendance data should be addressed to the Asst. Superintendent for Pupil Services

The Board of Education has granted the Principal, at the building level,, permission to release attendance data to his staff. The Board policy concerning all other requests for attendance data stipulates that responses to these inquiries must be approved by the Superintendent, or his designee.

CHAPTER XVI

Activity #15: Final Orientation

The final orientation sessions should briefly describe the entire student information system. The orientation format should include: the presentation of each card; statements concerning the dictionaries and procedural materials for each card; the file system, with special emphasis on the location of each card uses of the cross-reference file; information concerning the operational procedures involving data requests; and, the identification of all district-wide policies that have been developed pertaining to the student information system.

Major Steps

1. Board of Education
2. Staff

Step #1: Board of Education

a. Orientation

Recommendations For Step #1

a. Have a separate orientation session for members of the Board. Even though the Board has been informed at various stages of the system's development, the members could have some constructive recommendations. The presentation should include: a description of the system; the implementation plan; and a suggested calendar of dates for updating the Board on the progress/evaluation of the system. If you do present a calendar, attempt to obtain a commitment from the Board for reporting on the identified dates. Be sure to acknowledge key personnel involved in the development of the system; coordinator, members of the Advisory Committee, representatives, and other deserving individuals.

Step #2: Staff

a. Orientation

Recommendations For Step #2

a. The staff s orientation should be similar to that conducted for the Board of Education. A very brief description of the developmental processes should be presented first. This should be followed by: a presentation of each card, and comments about each card; statements about the dictionaries; the file system; the location of each card; a description of the operational procedures; the identification of Board policies concerning the system; statements concerning the staff's involvement in the evaluation process, and their involvement in the

revision of any materials. When commenting on the means of implementation; be sure to state that only one card at a time will be implemented, and that all revised materials will be implemented at the first grade level Before closing the orientation session, acknowledge all deserving individuals involved in the development of the system, and especially the effort put forth by the entire staff.

CHAPTER XVII

Review

This publication was developed primarily for local school superintendents and local coordinators. It describes the necessary activities to be conducted if a local school system desires to develop its own student information system. This manual actually goes beyond the development of just a student information system. The same processes/activities are applicable to the development of a total informational system or any sub-system thereof; personnel, facilities, budget,or program development.

Each chapter contains samples of products that were developed by the pilot school system (Auburn City School System, Auburn, Alabama) during its developmental efforts.

The appendices includes worksheets for each activity. These worksheets are designed to be used in applying the processes described in each activity. Each worksheet is keyed to its related page(s) in the manual.

Appendix I

Situational Survey

1. List those aspects of your total program that should be considered in ascertaining your "need" for an updated informational system.

    1.
    2.
    3.
    4.
    5.
    6.
    7.
    8.
    9.
    10.

2. Compare your list with those identified by other participants and list those items you feel are worthy of consideration.

    1.
    2.
    3.
    4.
    5.
    6.
    7.
    8.
    9.
    10.

Appendix II

Key Personnel List

1. List the members of your Central Office staff that you feel should be included in the "select group."

   1.
   2.
   3.
   4.

2. List the members of your instructional staff that you feel should be included in the "select group."

Antagonists	Protagonists
1.	1.
2.	2.
3.	3.
4.	4.
	5.
	6.
	7.
	8.

3. List the members of your building-level administrative staff that you feel should be included in the "select group."

   1.
   2.
   3.
   4.

4. List the members of your supportive personnel that you feel should be included in the"select group."

   1.
   2.
   3.

Appendix III

Board Resolution

1. List those items of major importance which should be set forth in the resolution.

   1.

   2.

   3.

   4.

   5.

   6.

   7.

2. List those items which you feel are imperative to the success of the developmental project that you desire Board approval on.

   1.

   2.

   3.

   4.

   5.

   6.

   7.

   8.

3. Write a resolution to your Board which contains those items listed in #1 and #2 above.

Appendix IV

News Release

1. List those items,which you feel should be communicated to the citizenry of your school system, that should be included in a news release describing the project.

    1.

    2.

    3.

    4.

    5.

    6.

    7.

    8.

2. Write a news release using the items that you have listed in #1.

Appendix V

LEA Coordinator

1. List the personal qualities you would prefer this individual possessed.

    1.

    2.

    3.

    4.

    5.

2. List the professional qualities you would prefer this individual possessed.

    1.

    2.

    3.

    4.

    5.

3. List the levels of professional training that you prefer this individual to have completed.

    1.

    2.

    3.

    4.

4. Write a job description for this position.

Appendix VI

Advisory Committee Members

1. List the responsibilities that these members will have.

    1.

    2.

    3.

    4.

    5.

    6.

    7.

    8.

    9.

    10.

2. Write a job description for this position.

Appendix VII

Employee Memorandum

Write a memorandum to all employees that requests their input into the selection process for the LEA Coordinator. Included in the memorandum should be a comment about the preferred qualifications for the position, a statement concerning the developmental project, the responsibilities of the position, and your desire to involve the entire staff in all of the developmental activities.

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Appendix VIII

Administrative Memorandum

Write a memorandum to all administrators in your school system requesting their recommendation(s) for the position of LEA Coordinator. Included in the memorandum should be a comment indicating that there is no option available; a response is mandated.

Appendix IX

News-Memorandum

Write a memorandum to all employees announcing the appointment of the LEA Coordinator. The memorandum should be so written that it can also be used as a news release. Included in the memorandum should be statements about the qualifications of the appointee and the individual named to fill the created vacancy.

Appendix X

Advisory Committee Selection

1. List the areas of representation to be included in your membership on the Advisory Committee.

    1.

    2.

    3.

    4.

    5.

    6.

    7.

    8.

2. What procedure have you selected for electing the members? Describe the election process.

Appendix XI

Advisory Committee Chart

Draw a schematic chart depicting the membership of the Advisory Committee. Included in the schematic chart should be indicators of the areas of representation, and levels of the organizational structure of the school system.

Appendix XII

Advisory Committee Memorandum

Write a memorandum to all employees of the school system, which can also be used as a news release, identifying those individuals elected and appointed to the Advisory Committee.

Appendix XIII

Forms Identification

Write a description of the process you intend to utilize for the collection of forms.

Appendix XIV

Collection Forms

1. Identify the different collection forms you plan on using to identify datum items.

2. Construct a sample of each of the forms identified in #1.

Appendix XV

Priority Forms

1. Identify the forms you intend to use in the prioritization process.

2. Construct a sample of each of the forms identified in #1.

Appendix XVI

Refinement of Data Needs

1. Identify the process you will utilize during the refinement of your data needs.

2. Construct a sample form for each instrument identified in your explanation of #1.

3. What will be the format of your data acquisition plan?

4. Construct a sample of the data acquisition plan format.

Appendix XVII

Data Categories

Separate your data into identifiable groups of information. Use Handbook V for placement purposes whenever possible.

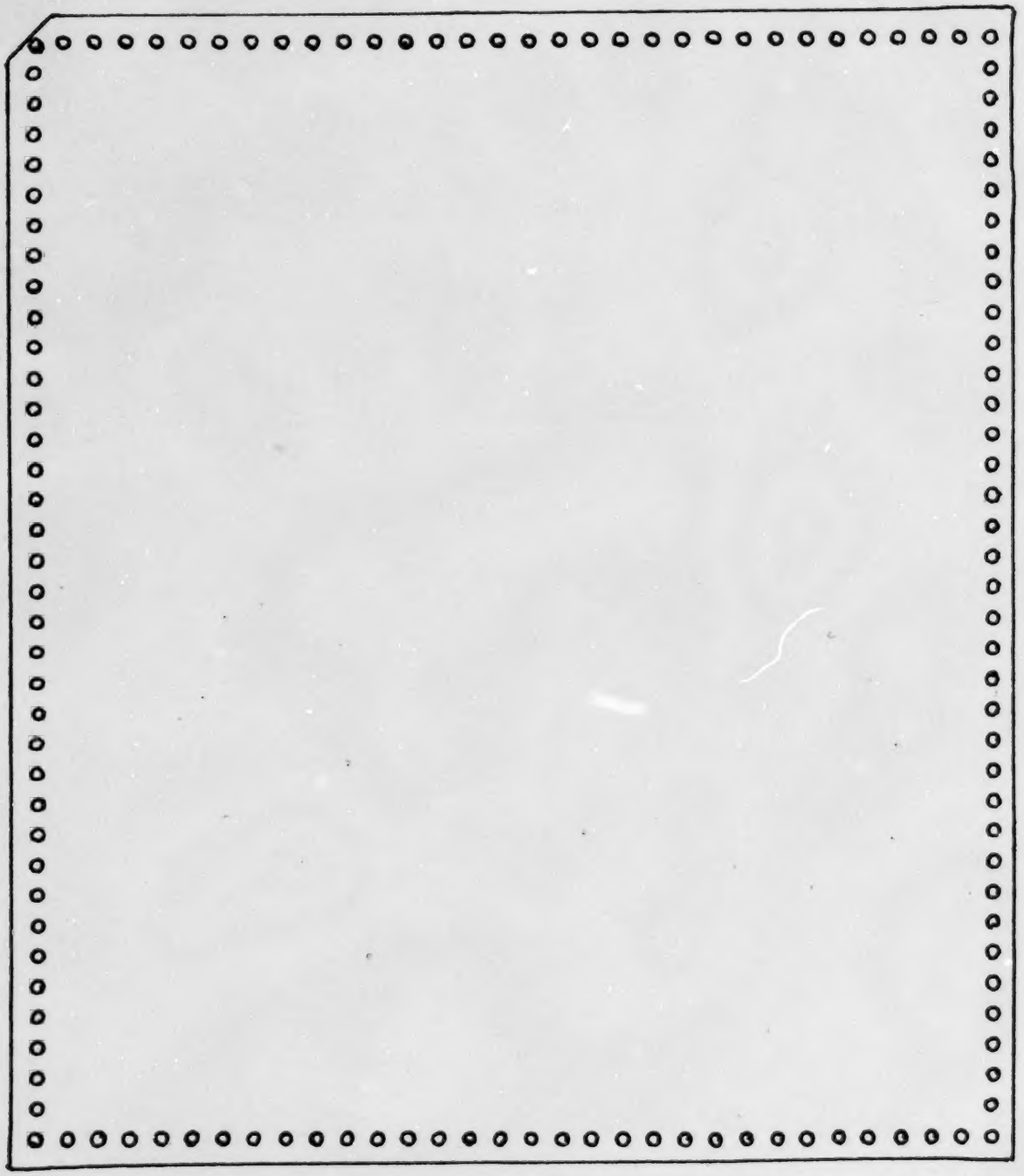
Example: Category I -- Demographic Information

Category II - Health Information

Category III- Enrollment Information

Appendix XVIII

Hole Numeration And Line Locations



Appendix XIX

Mock - Up

Appendix XX

Dictionaries

Select any one of the cards that you have developed and write a description of the process you would use in developing its dictionary.

Appendix XXI

Dictionary Format

Fill in the necessary information on this form; data to be used in this exercise is found on the card selected for the previous task.

Hole-Line Location	Identification of Data		Codes	
	Descriptor	Description	HEW	LEA

Appendix XXII

Procedural Materials - Card

1. Select one card from those that have been developed and list the major divisions of information contained therein.

    1.
    2.
    3.
    4.
    5.

2. Secondly, list the major categories of information for any one of the major divisions.

    1.
    2.
    3.
    4.
    5.
    6.
    7.

3. List the subordinate informational items for one of the categories listed in #2.

    1.
    2.
    3.
    4.
    5.
    6.
    7.
    8.
    9.

4. Write a statement which describes the actions that should be taken to properly maintain or enter data on the card.

Appendix XXIII

Field Testing

1. The information received concerns itself to which of the following:

   Card ____ Dictionaty ____ Procedures ____

2. The material in question is titled as:

   _____

3. The question arose from:

   Advisory Committee ____

   Feedback ____

   Analyses ____

4. The specific problem seems to be related to the following:

   Hole Punch ____

   Line Location ____

   Spelling ____

   Identifiers ____

   Format ____

5. Comments:

Appendix XXIV

Materials Revision Worksheet

1. Fill in the following information pertaining to each item of information that has been identified as "needing revision."

Card Title: _____

Recommendation:

Advisory Committee	____	Card	____
Feedback	____	Dictionary	____
Other	____	Procedures	____

Error:

Card ____

Dictionary ____

Procedures ____

Disposition:

Corrected ____

Unchanged ____

Comments:

Appendix XXV

File System Worksheet

1. How many cards do you plan on utilizing in your cross-reference file? _____

2. List the titles of the cards you propose to use.

   a. _____ e. _____

   b. _____ f. _____

   c. _____ g. _____

   d. _____ h. _____

3. Fill in the following form using the cards identified in #2.

Card	Location	Contact Person

4. Write a statement which describes the information on one of the cards, where it is located, and whom is to be contacted when information is requested.

Appendix XXVI

Operating Procedures - District

Select one card from those that have been developed and list the major divisions of information contained therein.

1.
2.
3.
4.
5.

Secondly, list the major categories of information for any one of the major divisions.

1.
2.
3.
4.
5.
6.
7.

List the subordinate informational items for one of the categories.

1.
2.
3.
4.
5.
6.
7.
8.
9.

Write a statement which describes the actions that should be taken to properly maintain, report, and request data from a given card.(Use the above data.)

Appendix XXVII

Final Orientation Checklist

You have completed the developmental activities and are now ready to prepare for the final orientation sessions.

A. List the steps you perceive as being necessary to conduct the orientation sessions.

1. 6.
2. 7.
3. 8.
4. 9.
5. 10.

B. Did you list the steps in the order that you plan on conducting them?

Yes_____ No_____

C. List the steps you plan on conducting in rank order.

1. 6.
2. 7.
3. 8.
4. 9.
5. 10.

D. When compared to the group's list, what steps had you failed to list?